

# The Seafood Industry in Canada: Fact Book

Prepared For:

**The U.S. Embassy,  
Office of Agricultural Affairs,  
Ottawa, Canada**

By:

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## KEY COMPARISONS BETWEEN THE U.S.A. AND CANADA

Key Comparisons and Indicators	U.S.A.	Canada
Approximate Currency Exchange (May, 2002)	USD 1.00	CAD 1.50
<u>Basic Comparative Indicators</u>		
Population (Millions)	287	31
Area (Millions of Square Km)	9.6	10.0
Water Area (Thousands of Square Km)	470	755
Coastline (Thousands of Km)	20	244
Landings (Year 2000, Millions of Tonnes)	4.1	1.1
Fishing Vessels (Thousands)	67	24
Auction	Yes	No
Per Capita Seafood Consumption (Kg)	7.1	11.0
<u>Processing Plants / Wholesalers, etc</u>		
Number of Companies	4,575	858
Number of Employees (Thousands)	85	69
Revenues (2002 FC, \$ billion)	USD 28.0	CAD 9.5
<u>Domestic Seafood Sales (USD Billions)</u>	<u>USD</u>	<u>CAD</u>
Retail Outlets	16.4	2.0
Food Services	35.6	4.1
Industrial	0.4	0.1
Total	52.4	6.2
<u>Import / Export (Year 2001, Thousands of Tonnes)</u>		
Imports	1,950	575
Exports	1,425	548
<u>Import / Export (Year 2001, Millions of Dollars)</u>	<u>USD</u>	<u>CAD</u>
Imports	10,200	2,171
Exports	3,200	4,212

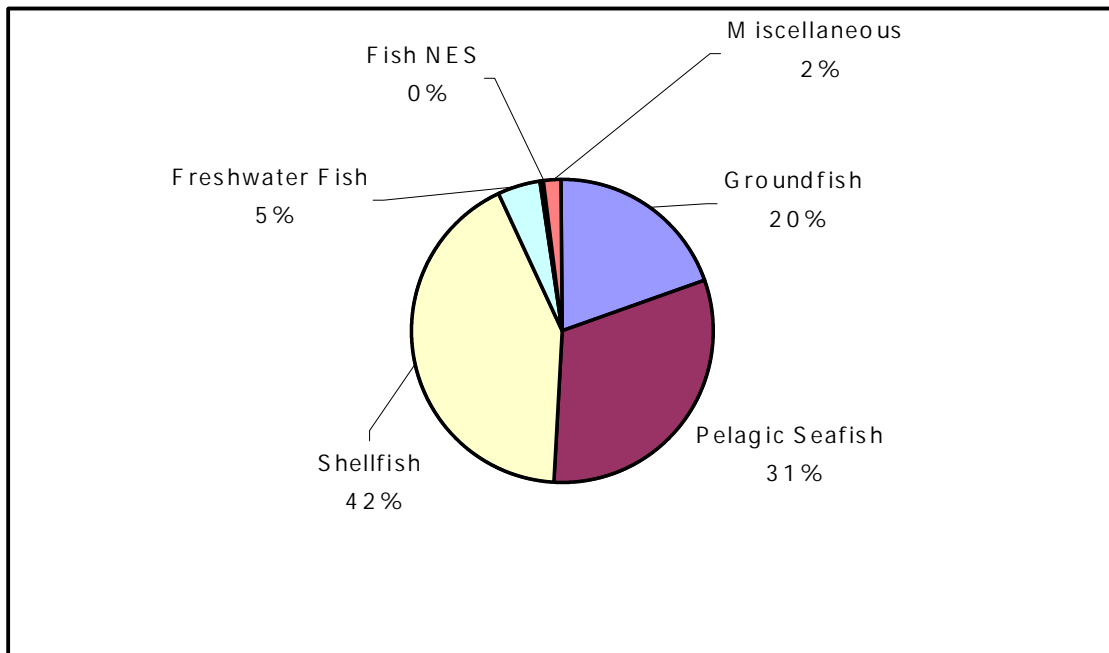
## CANADA'S SEAFOOD HARVEST

### By Species Group

#### TRENDS IN HARVEST BY SPECIES GROUP; TONNES

<b>Tonnes</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001 Proj.</b>	<b>2002 FC</b>	<b>CGR</b>
Groundfish	268,690	287,207	300,995	227,309	251,721	244,815	-1.4%
Pelagic Seafish	380,641	385,870	375,247	372,673	382,006	384,568	1.3%
Shellfish	369,852	396,487	426,907	466,858	496,402	529,055	8.1%
Freshwater Fish	45,771	49,462	53,766	53,291	56,417	58,668	4.2%
Fish NES	34,592	27,473	2,978	2,065	1,944	1,862	-18.0%
Miscellaneous	6,195	5,004	38,410	19,693	26,336	24,711	104.4%
<b>Total</b>	<b>1,105,740</b>	<b>1,151,503</b>	<b>1,198,301</b>	<b>1,141,888</b>	<b>1,214,825</b>	<b>1,243,678</b>	<b>3.0%</b>

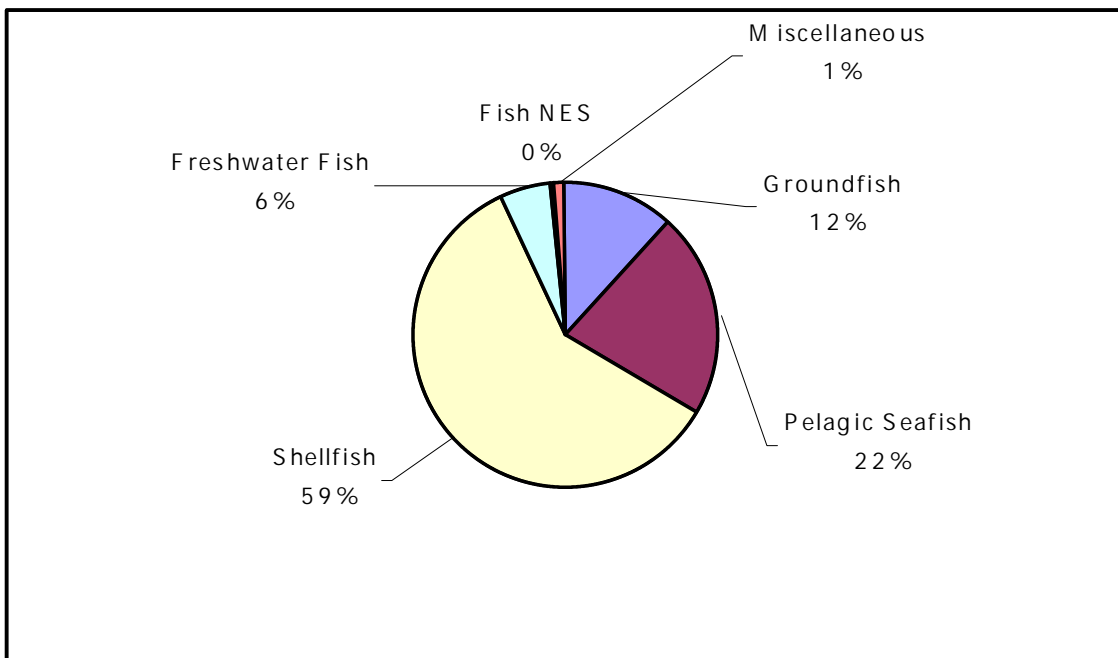
#### 2002 FC HARVEST BY SPECIES GROUP; TONNES



## TRENDS IN HARVEST BY SPECIES GROUP; CAD 000

	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Groundfish	\$261,374	\$292,497	\$332,471	\$311,058	\$355,368	\$378,651	8.9%
Pelagic Seafish	\$565,764	\$508,653	\$593,102	\$662,984	\$650,944	\$675,701	3.8%
Shellfish	\$1,115,832	\$1,170,443	\$1,464,626	\$1,614,329	\$1,723,328	\$1,869,597	10.2%
Freshwater Fish	\$104,288	\$128,026	\$151,730	\$146,245	\$164,748	\$177,097	9.0%
Fish NES	\$3,334	\$2,689	\$7,384	\$4,639	\$6,650	\$7,505	35.6%
Miscellaneous	\$37,751	\$20,088	\$40,809	\$34,396	\$32,774	\$32,264	5.4%
Total	\$2,088,344	\$2,122,395	\$2,590,121	\$2,773,652	\$2,933,813	\$3,140,814	8.1%

## 2002 FC HARVEST BY SPECIES GROUP; CAD 000

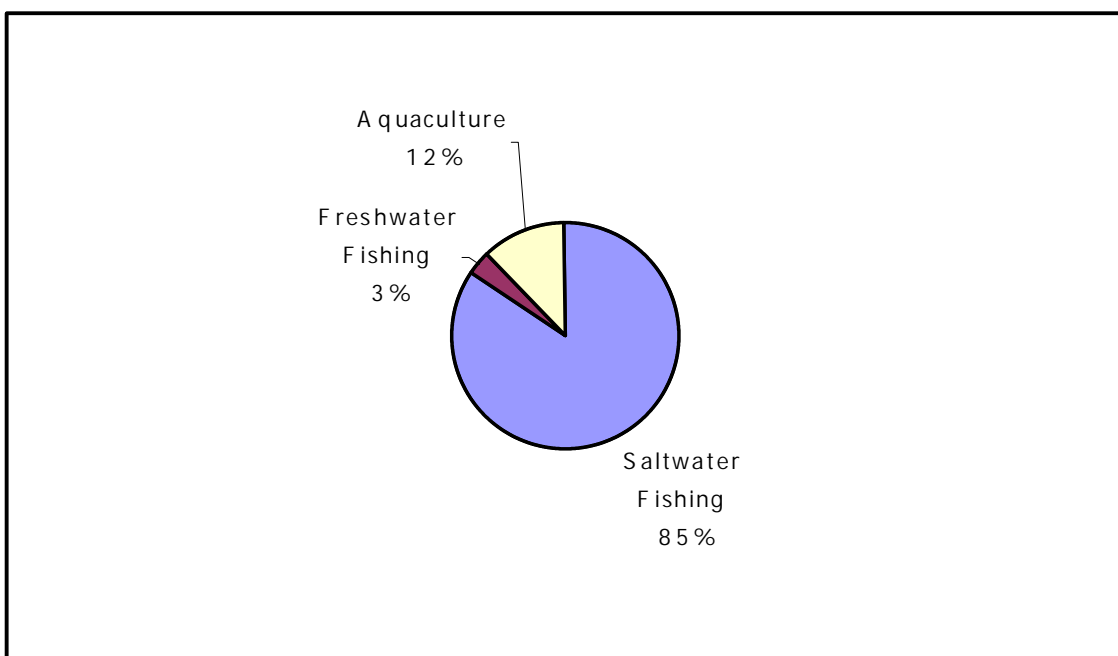


## By Capture Method

### TRENDS IN HARVEST BY CAPTURE METHOD; TONNES

<b>Tonnes</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001 Proj.</b>	<b>2002 FC</b>	<b>CGR</b>
Saltwater Fishing	985,273	1,019,447	1,044,568	977,374	1,036,274	1,051,042	2.1%
Freshwater Fishing	38,798	40,744	40,588	40,667	41,778	42,432	1.7%
Aquaculture	81,669	91,312	113,146	123,848	136,773	150,204	13.0%
Total	1,105,740	1,151,503	1,198,301	1,141,888	1,214,825	1,243,678	3.0%

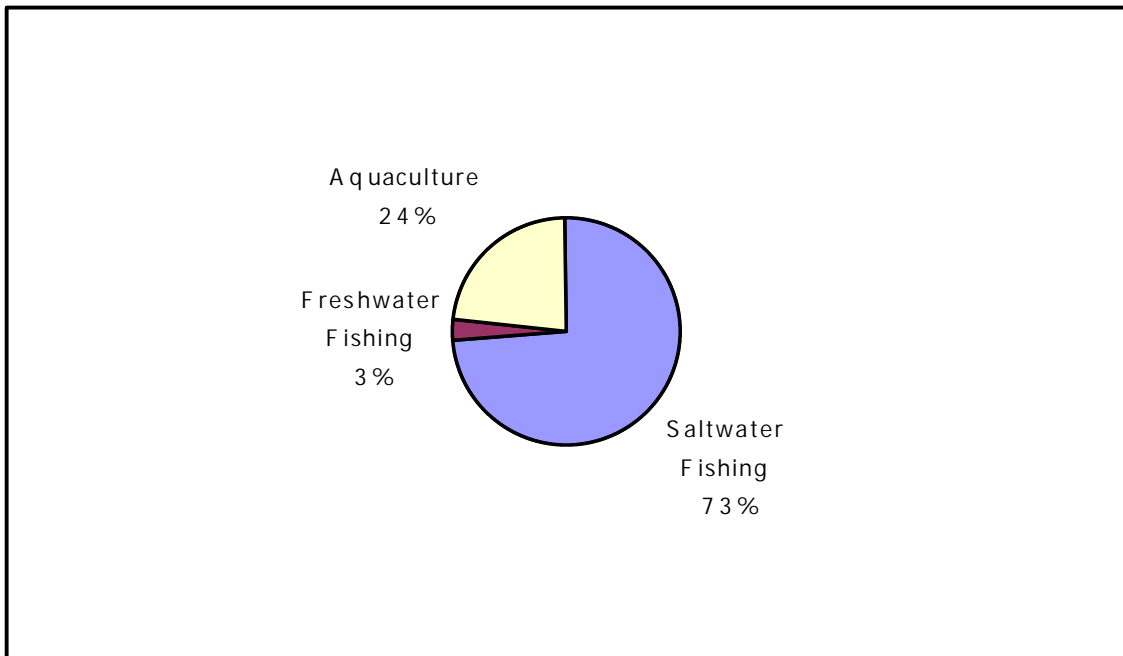
### 2002 FC HARVEST BY CAPTURE METHOD: TONNES



## TRENDS IN HARVEST BY CAPTURE METHOD; CAD 000

	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Saltwater Fishing	\$1,634,285	\$1,610,678	\$1,947,250	\$2,079,687	\$2,169,825	\$2,303,931	6.9%
Freshwater Fishing	\$70,505	\$83,092	\$85,753	\$83,126	\$91,245	\$95,545	5.7%
Aquaculture	\$383,554	\$428,625	\$557,118	\$610,839	\$672,743	\$741,338	13.3%
Total	\$2,088,344	\$2,122,395	\$2,590,121	\$2,773,652	\$2,933,813	\$3,140,814	8.1%

## 2002 FC HARVEST BY CAPTURE METHOD: CAD 000

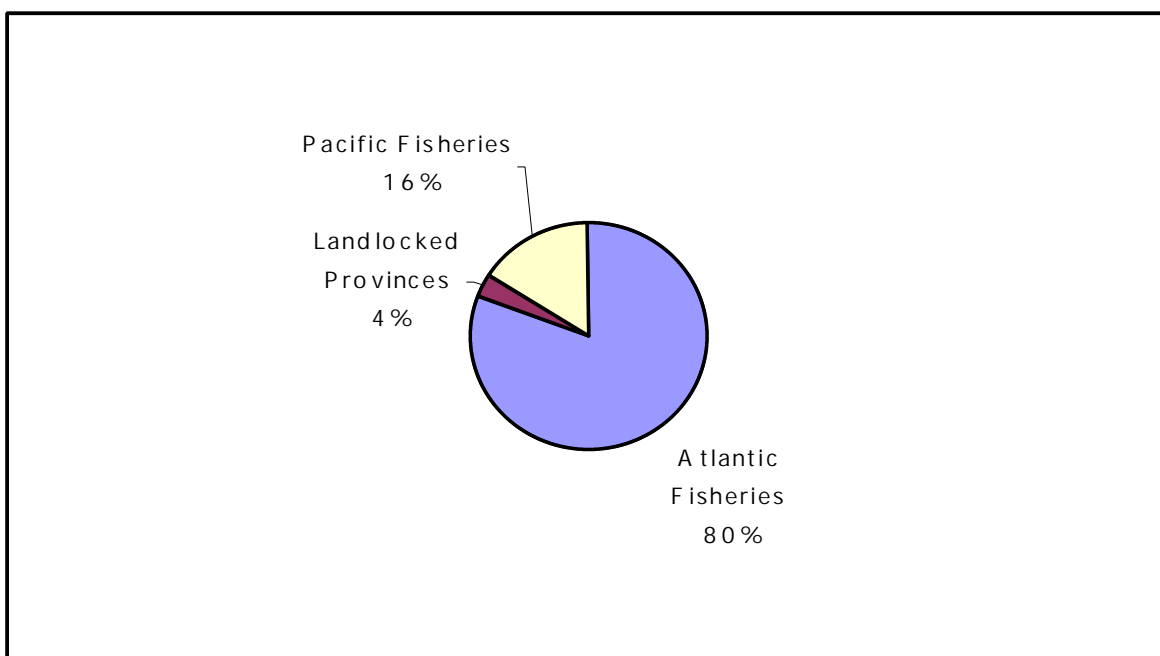


## By Fishery Location

### TRENDS IN HARVEST BY FISHERY LOCATION; TONNES

<b>Tonnes</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001 Proj.</b>	<b>2002 FC</b>	<b>CGR</b>
Atlantic Fisheries	779,539	829,467	880,583	898,671	958,460	1,003,945	5.7%
Landlocked Provinces	40,422	42,398	42,695	43,026	43,818	44,456	1.4%
Pacific Fisheries	285,779	279,639	275,024	200,192	212,547	195,276	-5.2%
Total	1,105,740	1,151,503	1,198,301	1,141,888	1,214,825	1,243,678	3.0%

### 2002 FC HARVEST BY FISHERY LOCATION: TONNES

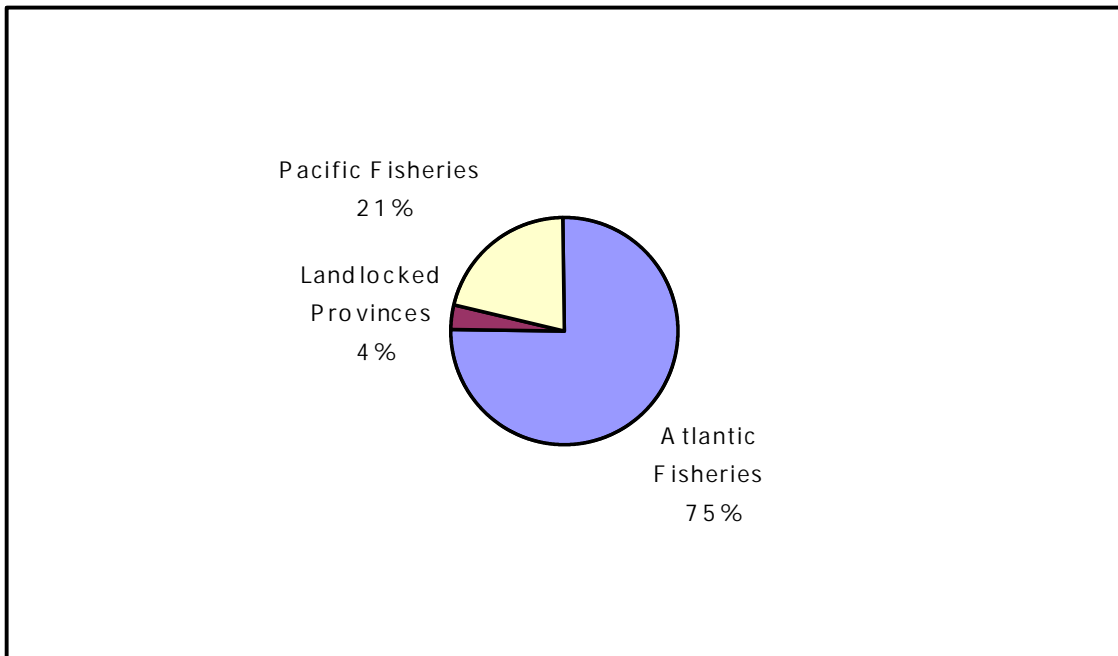




## TRENDS IN HARVEST BY FISHERY LOCATION; CAD 000

	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Atlantic Fisheries	\$1,397,238	\$1,471,194	\$1,859,698	\$2,014,390	\$2,169,007	\$2,354,697	10.4%
Landlocked Provinces	\$84,434	\$98,703	\$103,932	\$103,910	\$111,055	\$116,119	4.9%
Pacific Fisheries	\$606,672	\$552,498	\$626,491	\$655,352	\$653,750	\$669,998	2.5%
Total	\$2,088,344	\$2,122,395	\$2,590,121	\$2,773,652	\$2,933,813	\$3,140,814	8.1%

## 2002 FC HARVEST BY FISHERY LOCATION: CAD 000

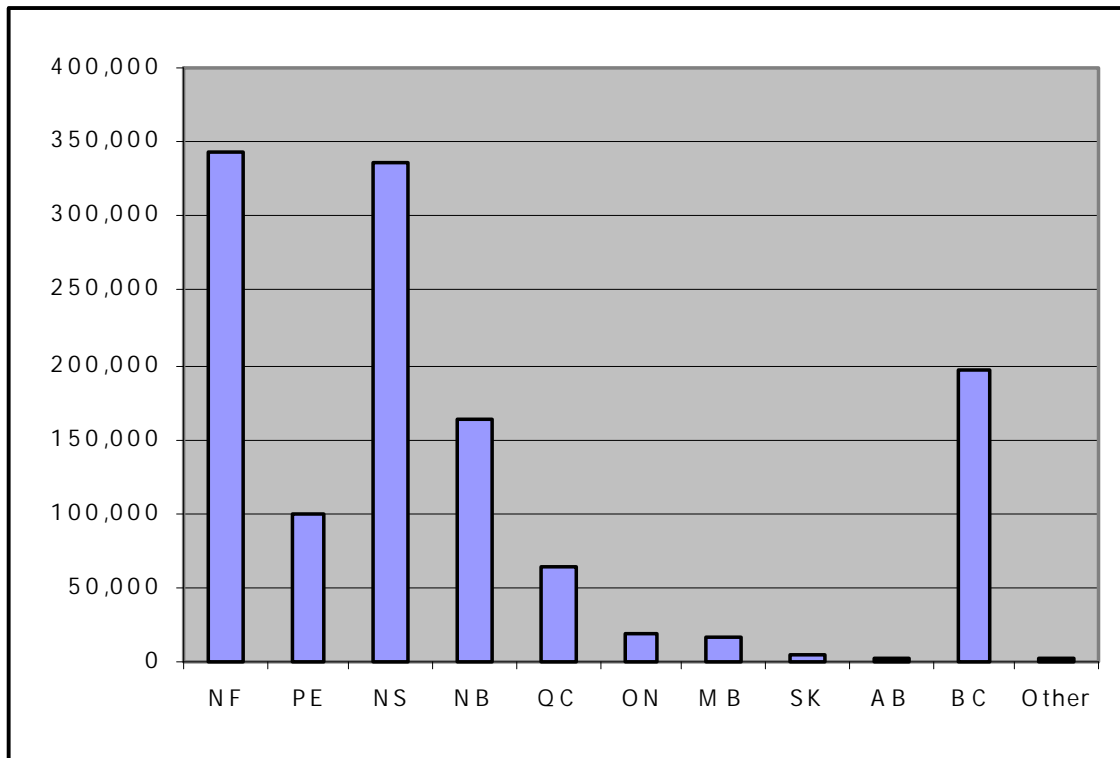


## By Province

### TRENDS IN HARVEST BY PROVINCE; TONNES

<b>Tonnes</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001 Proj.</b>	<b>2002 FC</b>	<b>CGR</b>
Newfoundland	222,037	267,779	285,547	280,895	320,123	343,294	9.9%
Prince Edward Island	69,579	73,526	77,650	89,549	92,524	98,398	7.4%
Nova Scotia	302,508	301,914	311,890	317,002	327,033	335,049	3.0%
New Brunswick	131,975	132,166	147,300	150,107	156,539	162,877	4.4%
Québec	53,441	54,082	58,197	61,118	62,241	64,328	3.3%
Ontario	23,188	23,658	21,827	18,215	19,401	18,659	-1.7%
Manitoba	10,130	10,898	13,222	15,899	15,860	17,030	7.3%
Saskatchewan	3,878	4,277	4,021	5,293	4,956	5,151	3.6%
Alberta	1,698	1,854	1,757	1,752	1,751	1,742	-0.7%
British Columbia	285,779	279,639	275,024	200,192	212,547	195,276	-5.2%
Other	1,528	1,711	1,868	1,867	1,850	1,874	0.2%
<b>Total</b>	<b>1,105,740</b>	<b>1,151,503</b>	<b>1,198,301</b>	<b>1,141,888</b>	<b>1,214,825</b>	<b>1,243,678</b>	<b>3.0%</b>

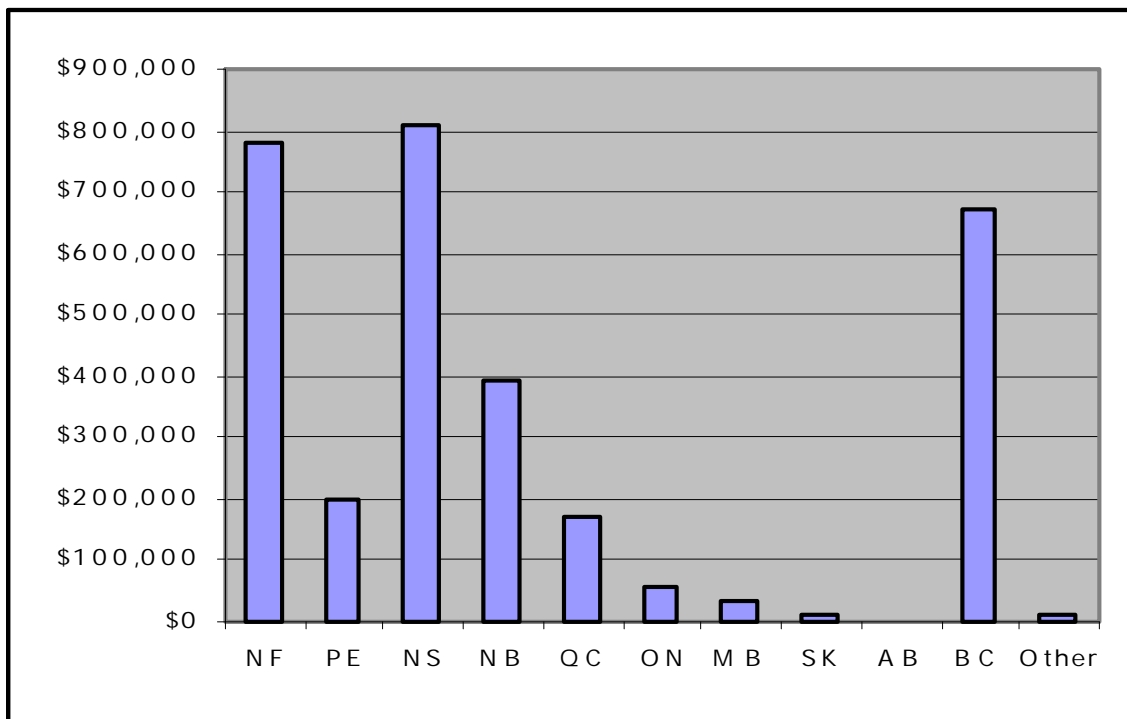
### 2002 FC HARVEST BY PROVINCE: TONNES



## TRENDS IN HARVEST BY PROVINCE; CAD 000

	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Newfoundland	\$330,541	\$397,196	\$563,045	\$605,952	\$694,571	\$779,963	18.1%
Prince Edward Island	\$127,944	\$140,672	\$158,182	\$171,059	\$185,441	\$199,758	9.7%
Nova Scotia	\$522,944	\$561,945	\$662,725	\$691,149	\$753,717	\$810,596	9.3%
New Brunswick	\$293,852	\$258,977	\$331,681	\$376,282	\$373,924	\$395,287	6.1%
Québec	\$121,958	\$112,404	\$144,066	\$169,948	\$161,354	\$169,093	4.0%
Ontario	\$59,051	\$62,400	\$60,605	\$57,310	\$58,386	\$57,833	-0.8%
Manitoba	\$14,978	\$20,664	\$26,841	\$27,519	\$31,684	\$35,181	15.1%
Saskatchewan	\$6,550	\$8,125	\$7,817	\$8,646	\$9,009	\$9,471	5.7%
Alberta	\$1,714	\$2,196	\$2,034	\$2,272	\$2,182	\$2,208	0.7%
British Columbia	\$606,672	\$552,498	\$626,491	\$655,352	\$653,750	\$669,998	2.5%
Other	\$2,141	\$5,318	\$6,635	\$8,163	\$9,795	\$11,426	38.0%
Total	\$2,088,344	\$2,122,395	\$2,590,121	\$2,773,652	\$2,933,813	\$3,140,814	8.1%

## 2002 FC HARVEST BY PROVINCE: CAD 000

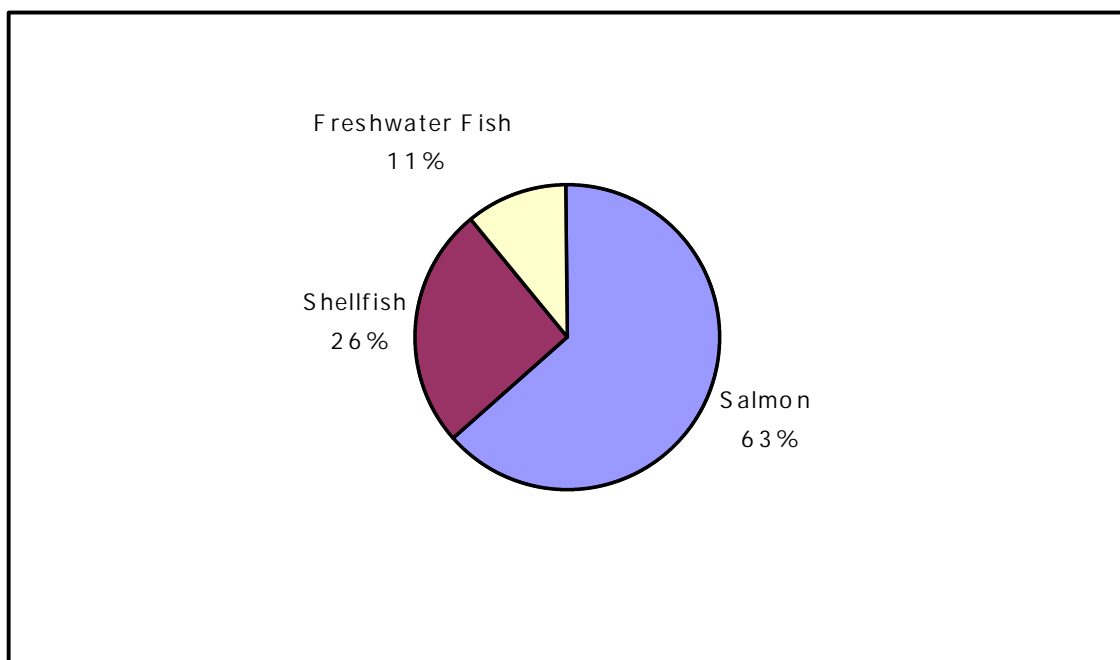


## Aquaculture

### TRENDS IN AQUACULTURE BY SPECIES GROUP; TONNES

<b>Tonnes</b>	<b>1996</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001 Proj.</b>	<b>2002 FC</b>	<b>CGR</b>
Salmon	45,624	56,775	58,618	72,890	78,495	87,038	95,223	13.3%
Shellfish	19,071	17,921	23,976	27,078	32,729	35,097	38,744	13.2%
Freshwater Fish	7,739	6,973	8,718	13,178	12,624	14,639	16,236	14.8%
Aquaculture Total	72,434	81,669	91,312	113,146	123,848	136,773	150,204	13.0%

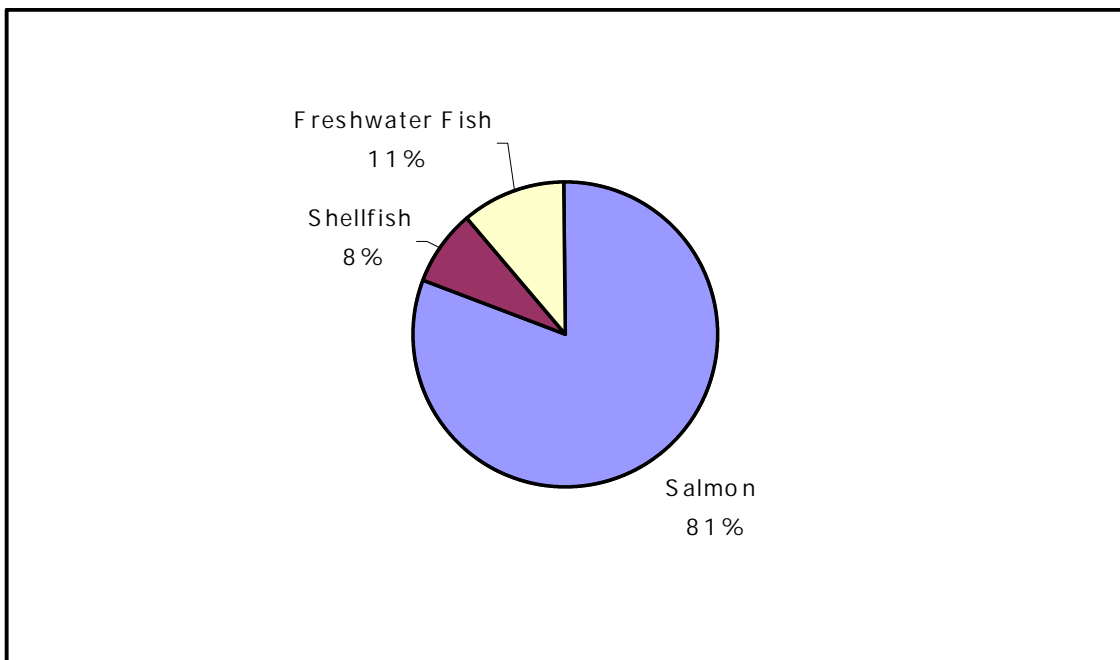
### 2002 FC AQUACULTURE HARVEST BY SPECIES GROUP; TONNES



## TRENDS IN AQUACULTURE BY SPECIES GROUP; CAD 000

	1996	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Salmon	\$287,154	\$324,030	\$349,043	\$450,084	\$495,555	\$544,030	\$598,316	13.2%
Shellfish	\$28,516	\$25,741	\$34,648	\$41,057	\$52,165	\$55,210	\$61,471	14.6%
Freshwater Fish	\$38,973	\$33,783	\$44,934	\$65,977	\$63,119	\$73,503	\$81,552	14.9%
Aquaculture Total	\$354,643	\$383,554	\$428,625	\$557,118	\$610,839	\$672,743	\$741,338	13.3%

## 2002 FC AQUACULTURE HARVEST BY SPECIES GROUP; CAD 000

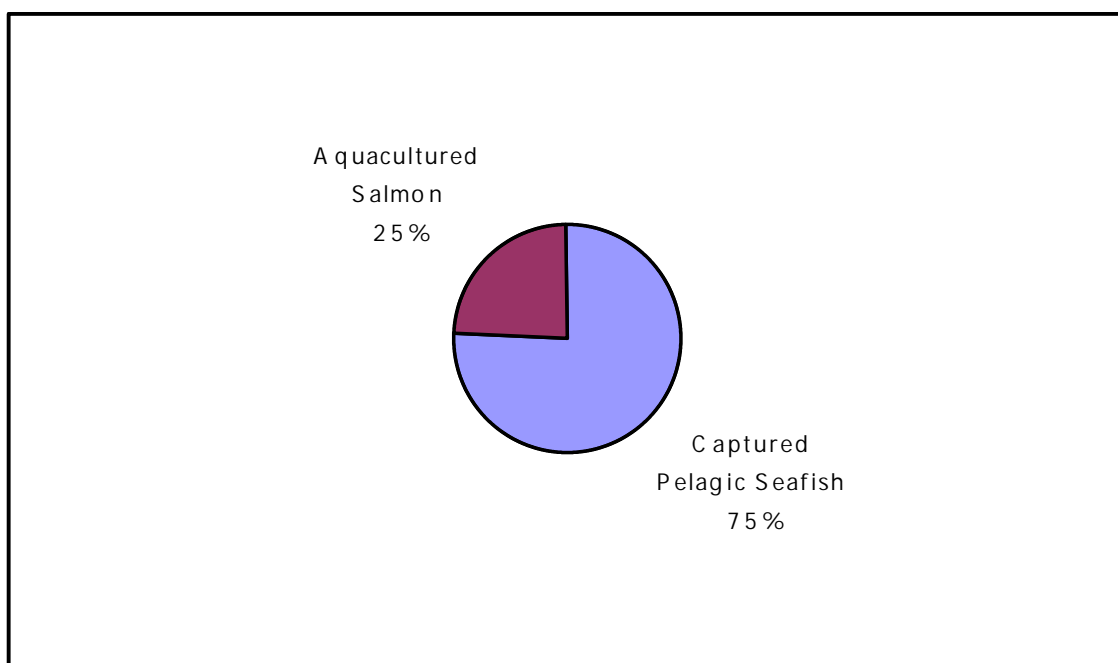


## Pelagic Sea Fish

### TRENDS IN HARVEST OF PELAGIC FISH BY HARVESTING METHOD; TONNES

	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Captured Pelagic Seafish	323,866	327,252	302,357	294,178	294,968	289,344	-1.2%
Aquacultured Salmon	56,775	58,618	72,890	78,495	87,038	95,223	13.3%
Pelagic Seafish Total	380,641	385,870	375,247	372,673	382,006	384,568	1.3%

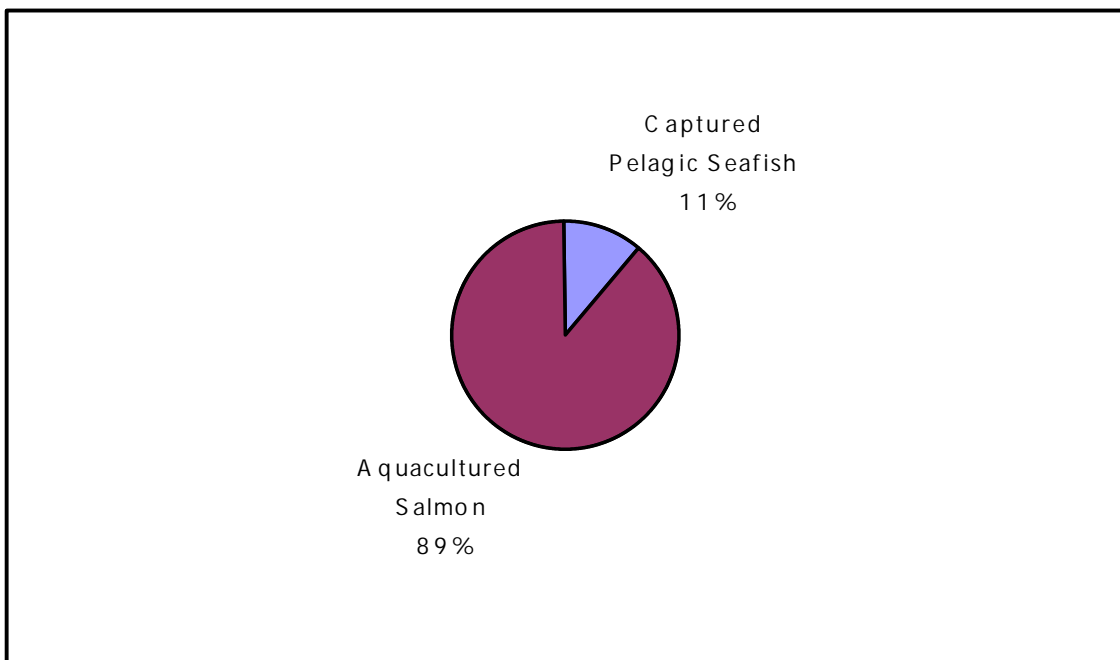
### 2002 FC HARVEST OF PELAGIC FISH BY HARVESTING METHOD; TONNES



## TRENDS IN HARVEST OF PELAGIC FISH BY HARVESTING METHOD; CAD 000

	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Captured Pelagic Seafish	\$241,734	\$159,610	\$143,018	\$167,429	\$106,914	\$77,385	-16.7%
Aquacultured Salmon	\$324,030	\$349,043	\$450,084	\$495,555	\$544,030	\$598,316	13.2%
Pelagic Seafish Total	\$565,764	\$508,653	\$593,102	\$662,984	\$650,944	\$675,701	3.8%

## 2002 FC HARVEST OF PELAGIC FISH BY HARVESTING METHOD; CAD 000

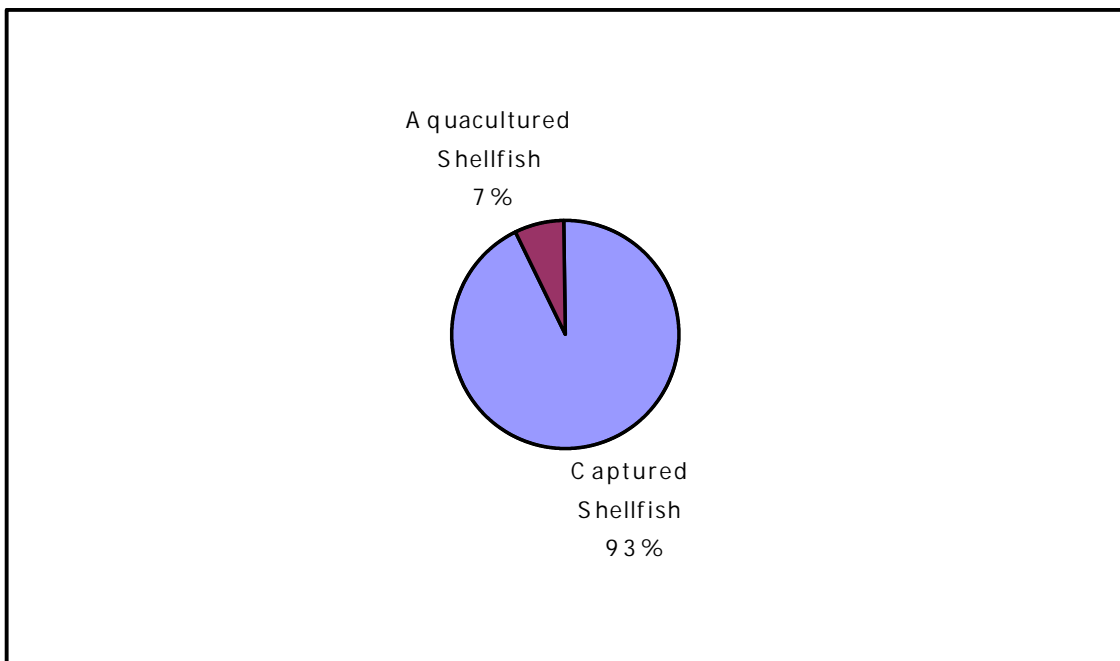


## Shellfish

### TRENDS IN HARVEST OF SHELLFISH BY HARVESTING METHOD; TONNES

	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Captured Shellfish	351,931	372,511	399,829	434,129	461,305	490,310	7.8%
Aquacultured Shellfish	17,921	23,976	27,078	32,729	35,097	38,744	13.2%
Shellfish Total	369,852	396,487	426,907	466,858	496,402	529,055	8.1%

### 2002 FC HARVEST OF SHELLFISH BY HARVESTING METHOD; TONNES

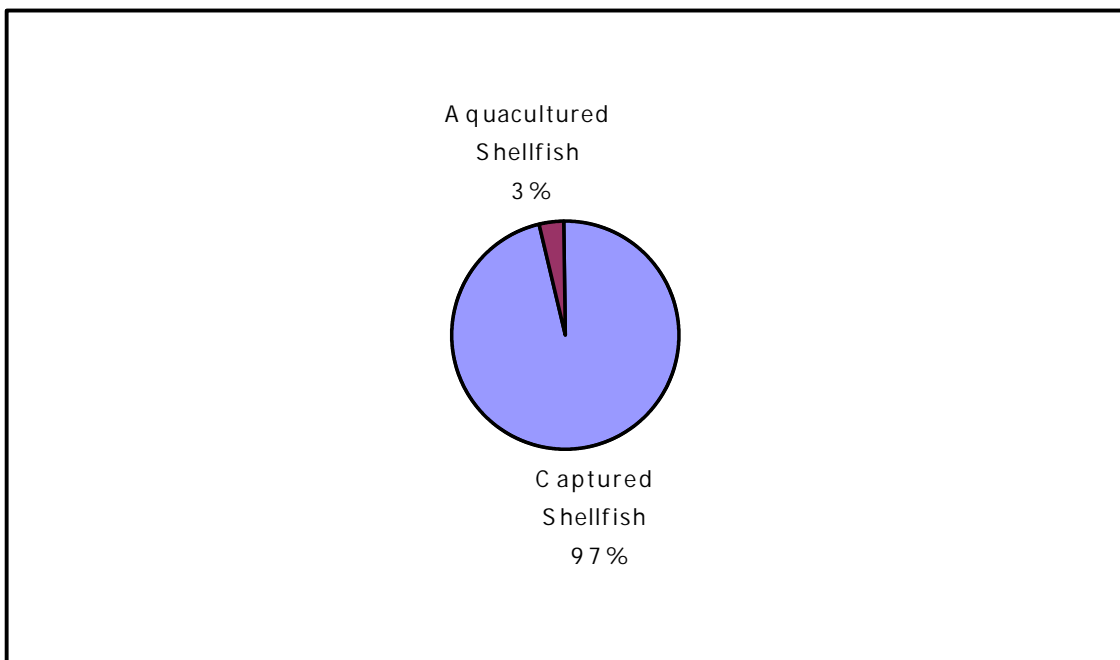




## TRENDS IN HARVEST OF SHELLFISH BY HARVESTING METHOD; CAD 000

	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Captured Shellfish	\$1,090,091	\$1,135,795	\$1,423,569	\$1,562,164	\$1,668,119	\$1,808,126	10.1%
Aquacultured Shellfish	\$25,741	\$34,648	\$41,057	\$52,165	\$55,210	\$61,471	14.6%
Shellfish Total	\$1,115,832	\$1,170,443	\$1,464,626	\$1,614,329	\$1,723,328	\$1,869,597	10.2%

## 2002 FC HARVEST OF SHELLFISH BY HARVESTING METHOD; CAD 000

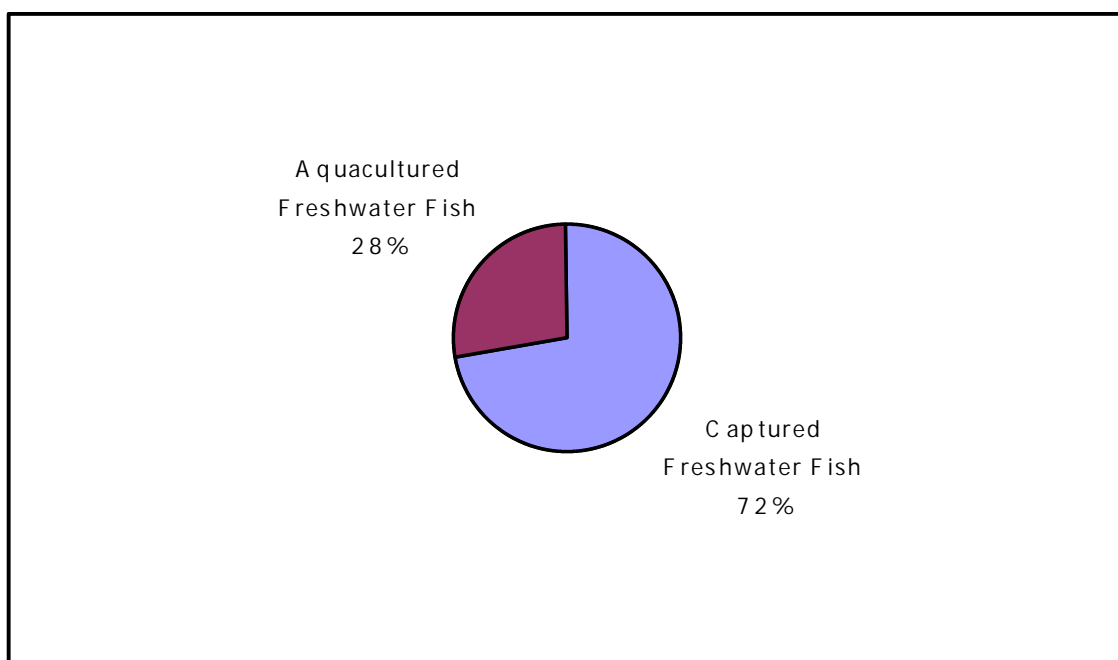


## Freshwater Fish

### TRENDS IN HARVEST OF FRESHWATER FISH BY HARVESTING METHOD; TONNES

	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Captured Freshwater Fish	38,798	40,744	40,588	40,667	41,778	42,432	1.7%
Aquacultured Freshwater Fish	6,973	8,718	13,178	12,624	14,639	16,236	14.8%
Freshwater Fish Total	45,771	49,462	53,766	53,291	56,417	58,668	4.2%

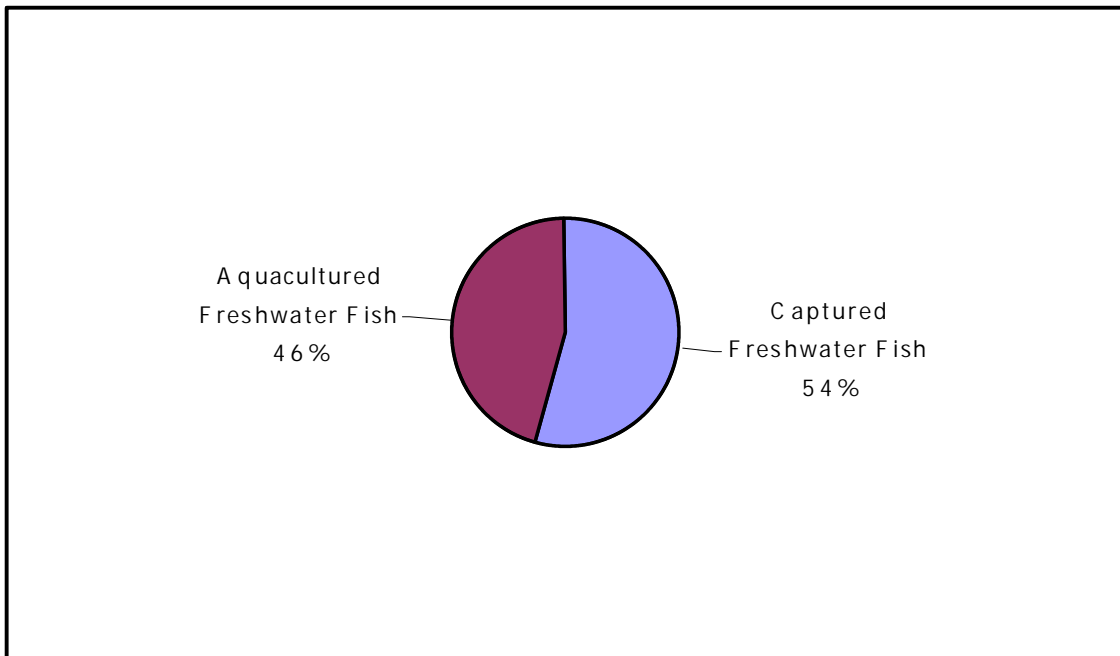
### 2002 FC HARVEST OF FRESHWATER FISH BY HARVESTING METHOD; TONNES



## TRENDS IN HARVEST OF FRESHWATER FISH BY HARVESTING METHOD; CAD 000

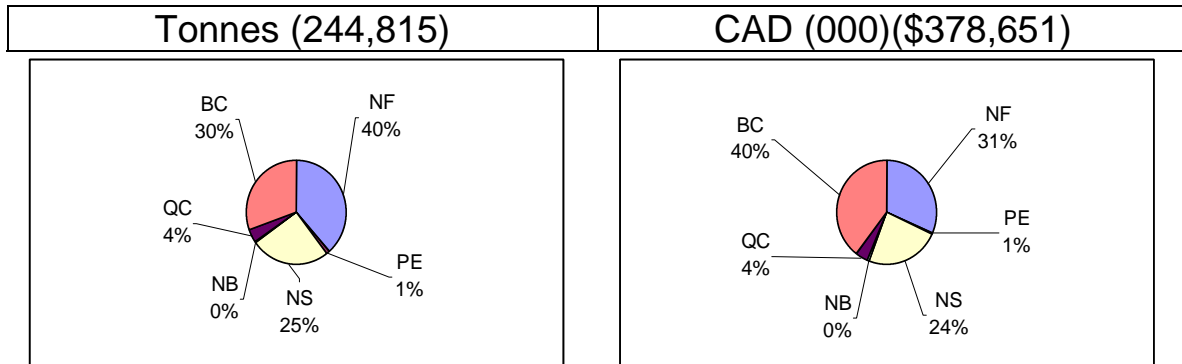
	1997	1998	1999	2000	2001 Proj.	2002 FC	CGR
Captured Freshwater Fish	\$70,505	\$83,092	\$85,753	\$83,126	\$91,245	\$95,545	5.7%
Aquacultured Freshwater Fish	\$33,783	\$44,934	\$65,977	\$63,119	\$73,503	\$81,552	14.9%
Freshwater Fish Total	\$104,288	\$128,026	\$151,730	\$146,245	\$164,748	\$177,097	9.0%

## 2002 FC HARVEST OF FRESHWATER FISH BY HARVESTING METHOD; CAD 000

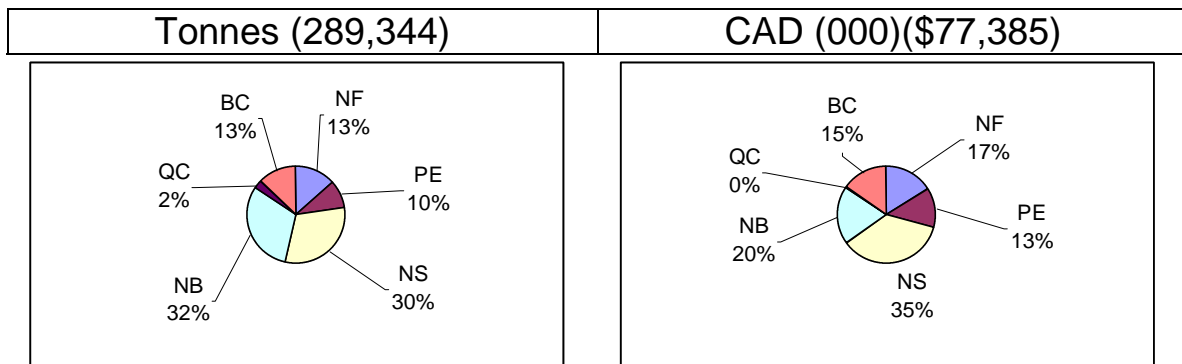


## Species Group by Province

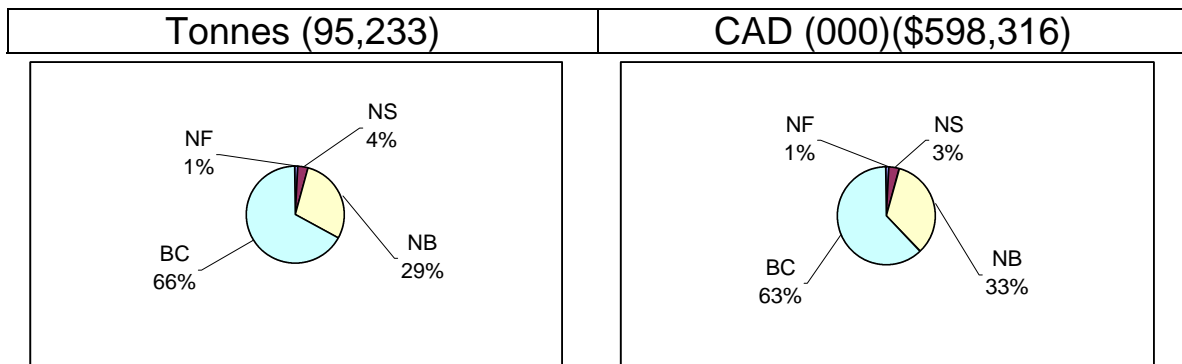
### 2001 FC GROUND FISH HARVEST BY PROVINCE



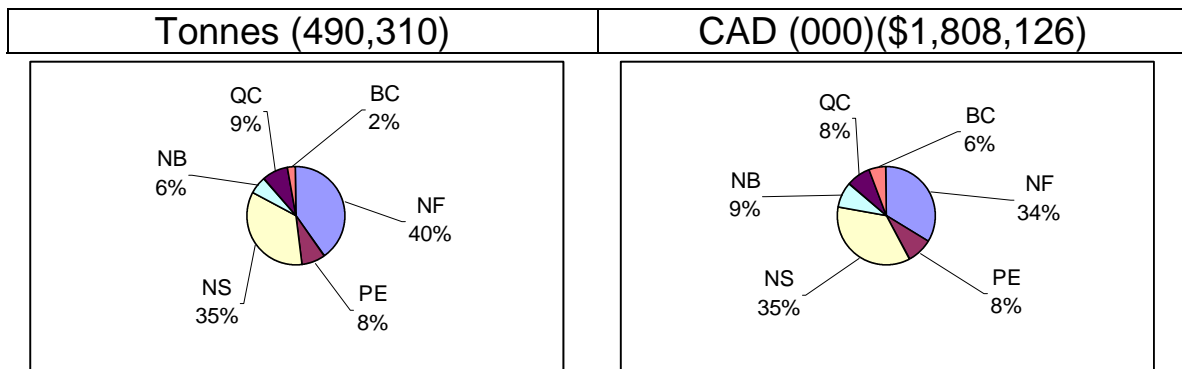
### 2001 FC PELAGIC SEAFISH HARVEST BY PROVINCE



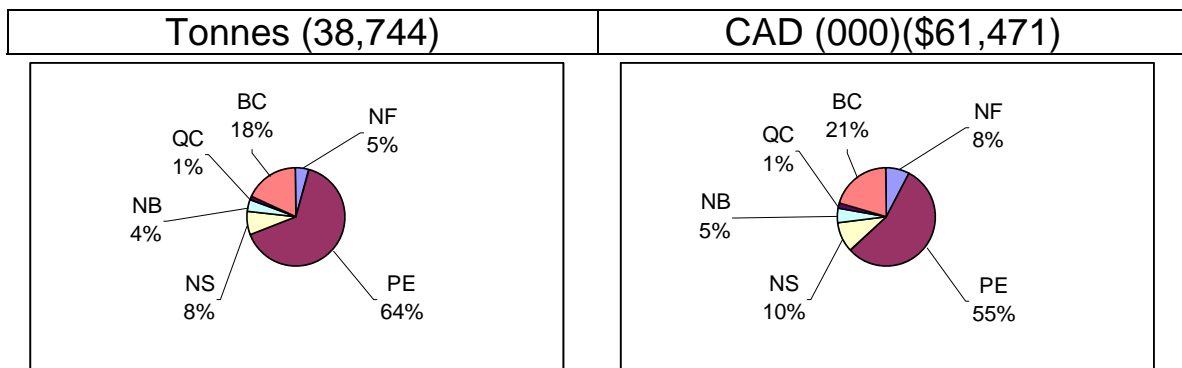
### 2001 FC AQUACULTURED SALMON HARVEST BY PROVINCE



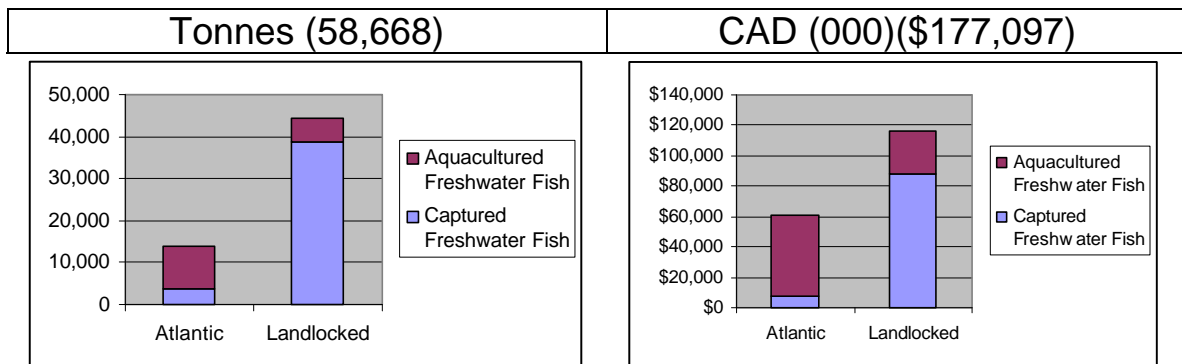
## 2001 FC CAPTURED SHELLFISH HARVEST BY PROVINCE



## 2001 FC AQUACULTURED SHELLFISH HARVEST BY PROVINCE



## 2001 FC FRESHWATER FISH HARVEST BY REGION



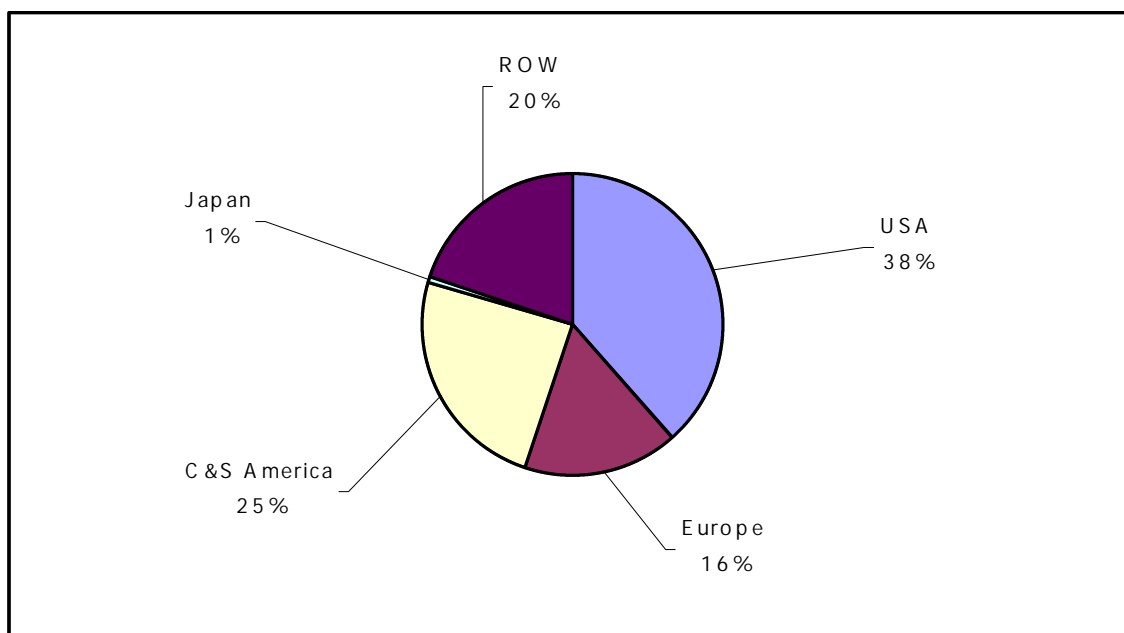
## CANADA'S SEAFOOD IMPORTS

### By Country or Region

#### TRENDS IN IMPORTS BY COUNTRY OR REGION; TONNES

Tonnes	1997	1998	1999	2000	2001	2002 FC	CGR %
USA	182,456	190,909	196,671	207,157	226,226	231,820	4.9%
Europe	102,671	116,596	110,665	103,387	95,673	97,637	-0.7%
C&S America	74,723	52,385	79,035	109,801	140,023	147,598	18.6%
Japan	5,046	4,109	4,123	3,058	3,925	3,064	-7.5%
ROW	74,437	85,079	97,928	102,394	108,900	119,620	10.0%
Total	439,333	449,078	488,422	525,797	574,747	599,740	6.5%

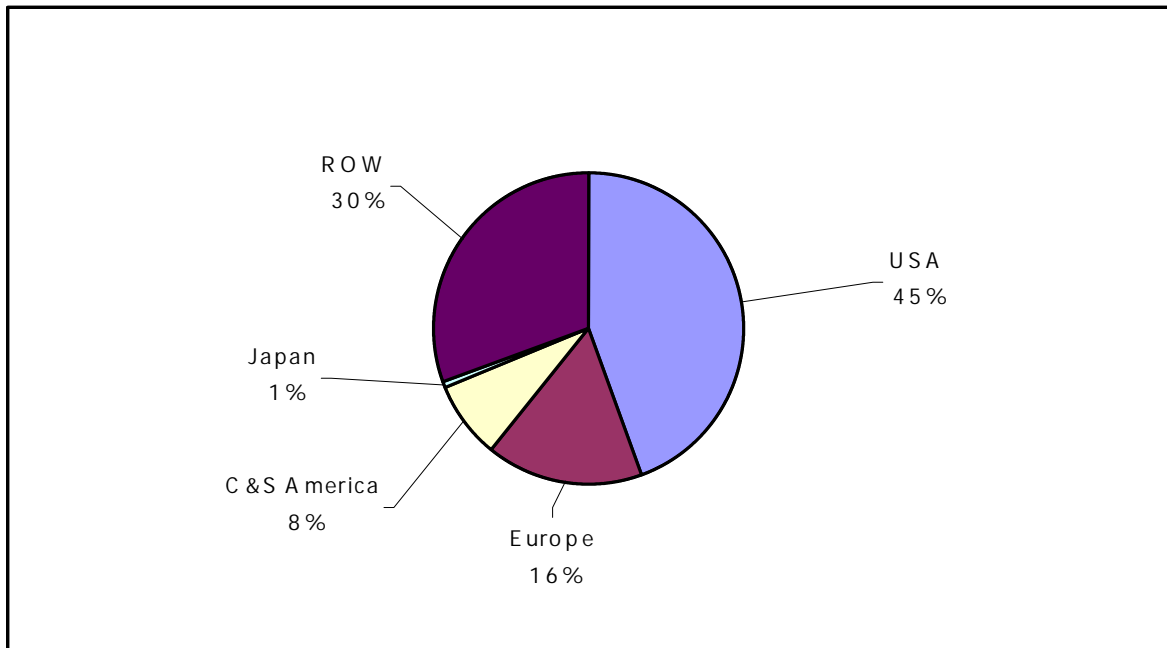
#### 2002 FC IMPORTS BY COUNTRY OR REGION; TONNES



## TRENDS IN IMPORTS BY COUNTRY OR REGION; CAD 000

Dollars	1997	1998	1999	2000	2001	2002 FC	CGR %
USA	\$631,319	\$701,540	\$873,009	\$912,514	\$935,865	\$1,056,869	11.1%
Europe	\$322,196	\$405,909	\$414,834	\$379,994	\$361,327	\$392,556	4.7%
C&S America	\$153,318	\$147,383	\$142,502	\$170,016	\$193,661	\$192,372	5.1%
Japan	\$24,196	\$19,722	\$22,059	\$18,566	\$14,687	\$13,794	-9.9%
ROW	\$446,534	\$519,877	\$555,815	\$622,435	\$665,967	\$724,553	10.2%
Total	\$1,577,563	\$1,794,431	\$2,008,219	\$2,103,525	\$2,171,507	\$2,380,144	8.6%

## 2002 FC IMPORTS BY COUNTRY OR REGION; CAD 000

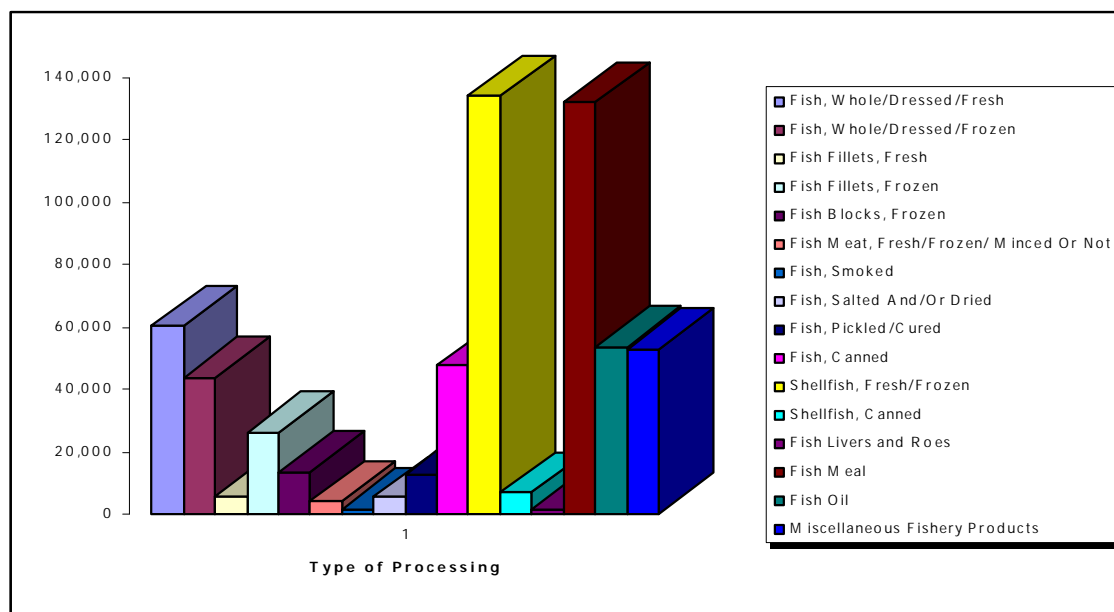


## By Type of Processing

### TRENDS IN IMPORTS BY TYPE OF PROCESSING; TONNES

Tonnes	1997	1998	1999	2000	2001	2002 FC	CGR %
Fish, Whole/Dressed/Fresh	31,705	36,825	45,896	51,015	52,255	60,126	13.9%
Fish, Whole/Dressed/Frozen	84,330	77,003	61,079	59,428	53,781	43,522	-12.1%
Fish Fillets, Fresh	1,336	1,587	3,274	3,595	5,019	5,774	37.9%
Fish Fillets, Frozen	17,713	18,203	22,002	21,472	24,579	25,894	8.2%
Fish Blocks, Frozen	10,361	11,063	13,199	10,955	13,327	13,528	6.4%
Fish Meat, Fresh/Frozen/ Minced Or Not	3,120	3,991	3,930	3,524	3,770	3,917	5.4%
Fish, Smoked	448	513	601	792	1,663	1,616	34.1%
Fish, Salted And/Or Dried	13,342	15,424	13,715	7,418	7,171	5,310	-14.1%
Fish, Pickled/Cured	455	671	532	11,714	8,551	12,555	429.7%
Fish, Canned	41,196	44,453	49,729	42,217	46,682	47,476	3.4%
Shellfish, Fresh/Frozen	76,747	82,759	104,727	112,884	119,398	133,931	12.0%
Shellfish, Canned	5,098	3,050	3,289	5,806	6,920	6,753	12.2%
Fish Livers and Roes	0	0	0	736	1,178	1,310	35.6%
Fish Meal	0	0	0	98,859	102,859	131,717	16.1%
Fish Oil	0	0	0	24,609	51,283	53,331	56.2%
Miscellaneous Fishery Products	153,482	153,536	166,449	70,773	76,311	52,979	-14.4%
Total	439,333	449,078	488,422	525,797	574,747	599,740	6.5%

### 2002 FC IMPORTS BY TYPE OF PROCESSING; TONNES

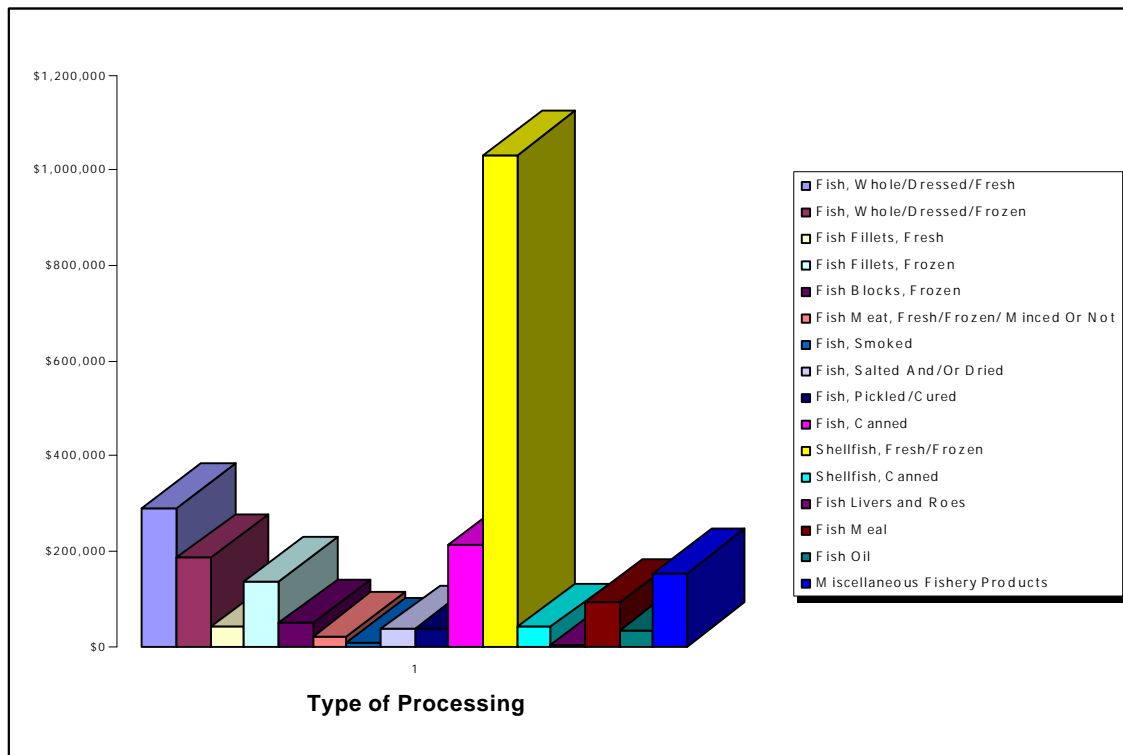




## TRENDS IN IMPORTS BY TYPE OF PROCESSING; CAD 000

Dollars	1997	1998	1999	2000	2001	2002 FC	CGR %
Fish, Whole/Dressed/Fresh	\$130,872	\$168,902	\$206,795	\$238,452	\$248,640	\$290,258	17.6%
Fish, Whole/Dressed/Frozen	\$237,249	\$251,858	\$236,639	\$213,642	\$190,380	\$186,367	-4.5%
Fish Fillets, Fresh	\$8,390	\$11,076	\$23,957	\$27,165	\$34,089	\$41,182	41.6%
Fish Fillets, Frozen	\$76,136	\$93,799	\$117,533	\$109,540	\$123,020	\$136,858	13.1%
Fish Blocks, Frozen	\$27,285	\$42,261	\$49,337	\$36,364	\$45,841	\$49,582	15.9%
Fish Meat, Fresh/Frozen/ Minced Or Not	\$12,688	\$17,385	\$17,496	\$18,538	\$19,842	\$21,828	12.1%
Fish, Smoked	\$3,691	\$5,331	\$6,193	\$5,744	\$7,330	\$7,965	17.9%
Fish, Salted And/Or Dried	\$55,955	\$71,766	\$61,866	\$40,374	\$41,697	\$36,359	-6.0%
Fish, Pickled/Cured	\$2,139	\$4,330	\$2,642	\$32,753	\$27,352	\$37,498	244.8%
Fish, Canned	\$167,718	\$201,005	\$219,386	\$194,929	\$201,029	\$214,977	5.6%
Shellfish, Fresh/Frozen	\$653,206	\$706,548	\$865,106	\$922,186	\$914,688	\$1,033,927	9.9%
Shellfish, Canned	\$29,549	\$23,474	\$26,680	\$34,423	\$39,796	\$40,217	7.8%
Fish Livers and Roes	\$0	\$0	\$0	\$2,718	\$4,181	\$4,704	33.2%
Fish Meal	\$0	\$0	\$0	\$66,153	\$73,867	\$92,170	18.2%
Fish Oil	\$0	\$0	\$0	\$16,707	\$30,920	\$33,090	46.0%
Miscellaneous Fishery Products	\$172,685	\$196,696	\$174,589	\$143,837	\$168,835	\$153,161	-1.4%
Total	\$1,577,563	\$1,794,431	\$2,008,219	\$2,103,525	\$2,171,507	\$2,380,144	8.6%

## 2002 FC IMPORTS BY TYPE OF PROCESSING; CAD 000

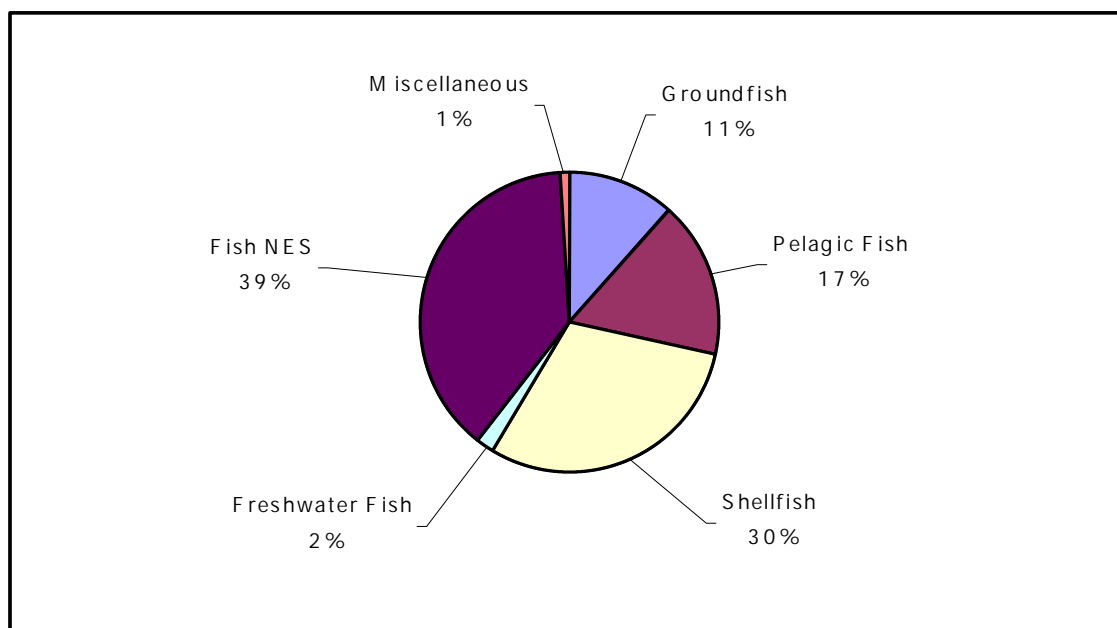


## By Species Group

### TRENDS IN IMPORTS BY SPECIES GROUP; TONNES

Tonnes	1997	1998	1999	2000	2001	2002 FC	CGR %
Groundfish	85,302	82,765	75,922	71,781	74,697	68,435	-4.2%
Pelagic Fish	86,905	84,504	105,832	95,207	95,921	102,294	4.0%
Shellfish	105,064	116,665	141,970	152,284	162,606	180,929	11.6%
Freshwater Fish	4,520	4,644	6,241	7,859	10,202	11,067	20.3%
Fish NES	155,550	158,036	157,360	193,603	225,420	230,586	8.6%
Miscellaneous	1,992	2,464	1,097	5,063	5,901	6,429	71.0%
Total	439,333	449,078	488,422	525,797	574,747	599,740	6.5%

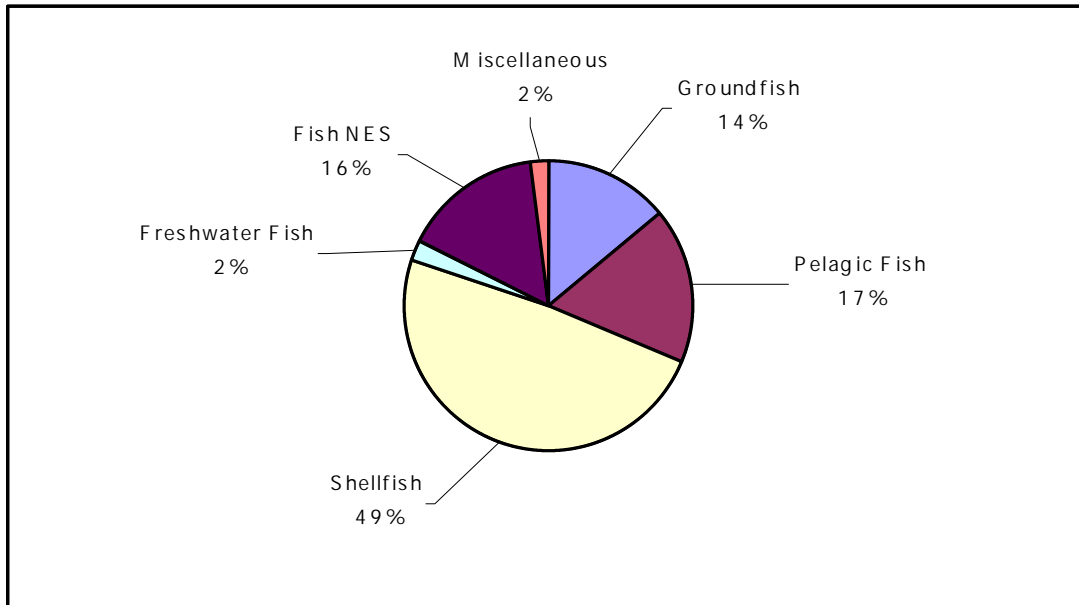
### 2002 FC IMPORTS BY SPECIES GROUP; TONNES



## TRENDS IN IMPORTS BY SPECIES GROUP; CAD 000

Dollars	1997	1998	1999	2000	2001	2002 FC	CGR %
Groundfish	\$255,767	\$313,739	\$328,791	\$301,903	\$313,417	\$333,763	5.9%
Pelagic Fish	\$293,863	\$337,181	\$393,892	\$377,480	\$370,563	\$412,706	7.4%
Shellfish	\$710,243	\$776,986	\$942,094	\$1,016,630	\$1,025,345	\$1,155,214	10.4%
Freshwater Fish	\$16,926	\$20,352	\$30,641	\$38,844	\$52,871	\$59,041	29.1%
Fish NES	\$290,474	\$331,793	\$301,925	\$337,077	\$370,698	\$376,113	5.7%
Miscellaneous	\$10,290	\$14,380	\$10,876	\$31,591	\$38,613	\$43,307	48.0%
Total	\$1,577,563	\$1,794,431	\$2,008,219	\$2,103,525	\$2,171,507	\$2,380,144	8.6%

## 2002 FC IMPORTS BY SPECIES GROUP; CAD 000

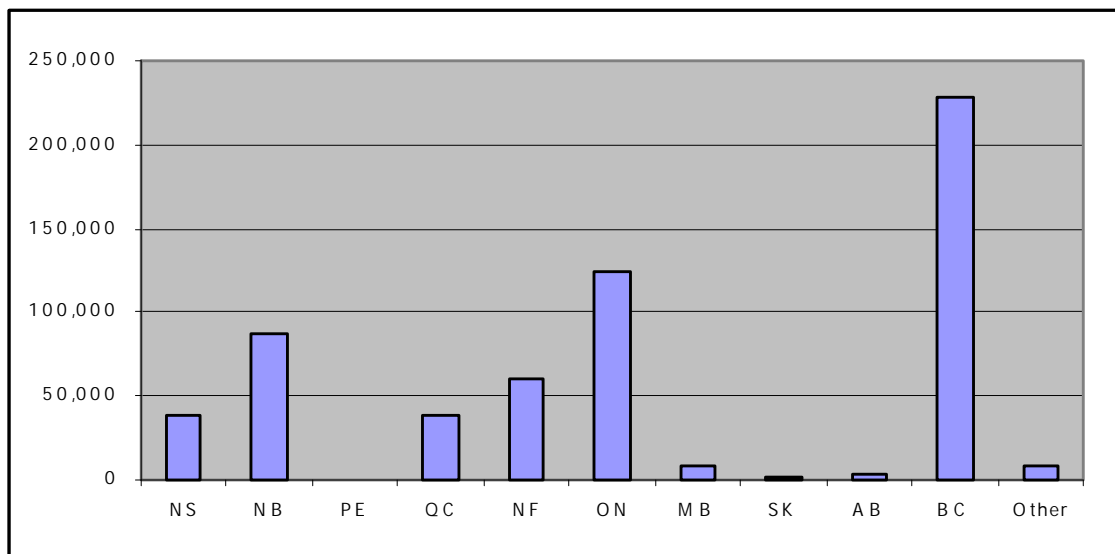


## By Province

### TRENDS IN IMPORTS BY PROVINCE; TONNES

Tonnes	1997	1998	1999	2000	2001	2002 FC	CGR %
Nova Scotia	50,185	48,676	38,474	48,836	38,790	38,203	-3.8%
New Brunswick	82,736	71,072	87,563	74,427	90,028	86,547	2.2%
Prince Edward Island	1	20	0	15	3	8	n/a
Quebec	27,388	27,707	33,277	32,457	37,077	38,820	7.5%
Newfoundland	42,426	44,488	48,959	54,564	56,510	60,863	7.5%
Ontario	86,224	95,450	104,276	106,832	117,234	124,024	7.6%
Manitoba	5,732	6,177	6,931	7,237	7,854	8,377	7.9%
Saskatchewan	580	1,128	1,282	1,824	1,281	1,848	33.0%
Alberta	2,468	3,106	2,717	3,092	3,389	3,503	8.0%
British Columbia	138,436	147,445	157,910	187,268	217,177	228,839	10.7%
Other	3,157	3,809	7,033	9,245	5,404	8,709	31.3%
Total	439,333	449,078	488,422	525,797	574,747	599,740	6.5%

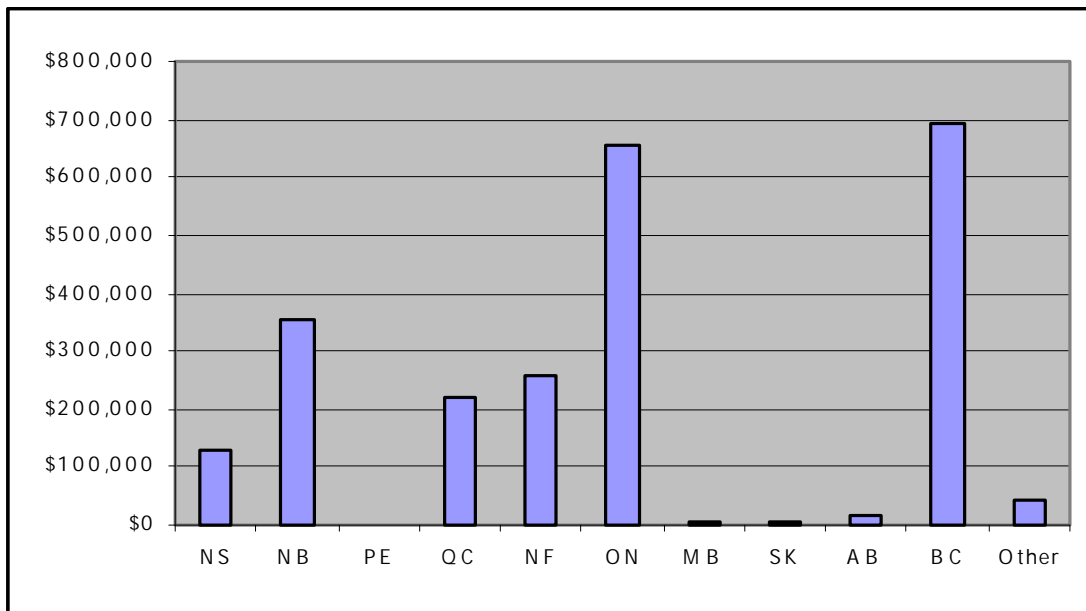
### 2002 FC IMPORTS BY PROVINCE; TONNES



## TRENDS IN IMPORTS BY PROVINCE; CAD 000

Dollars	1997	1998	1999	2000	2001	2002 FC	CGR %
Nova Scotia	\$129,735	\$156,140	\$133,401	\$137,752	\$129,055	\$131,292	0.9%
New Brunswick	\$253,507	\$239,298	\$310,303	\$312,217	\$327,132	\$354,542	7.6%
Prince Edward Island	\$4	\$24	\$2	\$213	\$12	\$113	n/a
Quebec	\$132,661	\$151,143	\$176,736	\$189,488	\$197,291	\$219,745	10.7%
Newfoundland	\$150,516	\$183,818	\$218,388	\$225,090	\$224,548	\$257,273	11.7%
Ontario	\$453,898	\$516,879	\$562,428	\$583,402	\$604,665	\$654,672	7.7%
Manitoba	\$7,658	\$8,293	\$5,912	\$7,131	\$8,618	\$7,750	2.2%
Saskatchewan	\$629	\$746	\$1,454	\$2,592	\$1,996	\$2,857	42.4%
Alberta	\$6,813	\$9,415	\$8,786	\$11,413	\$15,032	\$15,823	19.7%
British Columbia	\$431,409	\$513,077	\$552,746	\$594,068	\$635,393	\$692,026	10.0%
Other	\$10,733	\$15,598	\$38,063	\$40,159	\$27,765	\$44,051	44.5%
Total	\$1,577,563	\$1,794,431	\$2,008,219	\$2,103,525	\$2,171,507	\$2,380,144	8.6%

## 2002 FC IMPORTS BY PROVINCE; CAD 000



## 80:20 Analysis of Imports from the U.S.A.

### 80:20 ANALYSIS OF IMPORTS FROM THE USA; TONNES

Rank	Cum. %	Product Name	2002 FC Tonnes	Tonnes Cum.	%	Cum. %
1	0.6%	Coral,Shells,Cuttlebone Crude/Simply Prepared	27,092	27,092	11.7%	11.7%
2	1.2%	Fish,Shellfish Products Unfit For Human Consumption	22,762	49,854	9.8%	21.5%
3	1.9%	Lobster (Homarus Spp.) Live/Fresh/Dried/Salted/Brine	16,914	66,767	7.3%	28.8%
4	2.5%	Fish,Shellfish Meal Unfit For Human Consumption	13,329	80,097	5.7%	34.6%
5	3.1%	Sticks,Type Products Not Coated Of Minced	11,043	91,139	4.8%	39.3%
6	3.7%	Groundfish Cod Nspf Frozen	10,071	101,210	4.3%	43.7%
7	4.3%	Salmon Atlantic Fresh Farmed	9,974	111,184	4.3%	48.0%
8	4.9%	Salmon Nspf Canned Not In Oil	9,555	120,739	4.1%	52.1%
9	5.6%	Fish Nspf Fresh	9,265	130,004	4.0%	56.1%
10	6.2%	Fish Nspf Minced Frozen > 6.8kg	7,817	137,821	3.4%	59.5%
11	6.8%	Flatfish Halibut,Greenland Turbot Fresh	6,751	144,571	2.9%	62.4%
12	7.4%	Herring Fresh	6,714	151,285	2.9%	65.3%
13	8.0%	Crab Nspf Live/Fresh/Salted/Brine	6,502	157,787	2.8%	68.1%
14	8.6%	Salmon Sockeye Canned Not In Oil	5,443	163,230	2.3%	70.4%
15	9.3%	Fish Nspf Fillet Fresh	5,204	168,434	2.2%	72.7%
16	9.9%	Fish Nspf Fillet Frozen	4,596	173,030	2.0%	74.6%
17	10.5%	Fish Nspf Meat Frozen	4,270	177,300	1.8%	76.5%
18	11.1%	Fish Nspf Oil/Fractions	4,192	181,492	1.8%	78.3%
19	11.7%	Salmon Pink Fresh	3,490	184,982	1.5%	79.8%
20	12.3%	Herring Frozen	2,900	187,882	1.3%	81.0%
21	13.0%	Groundfish Cod Nspf Fresh	2,562	190,444	1.1%	82.2%
22	13.6%	Flatfish Halibut Atlantic,Pacific Frozen	2,269	192,713	1.0%	83.1%
23	14.2%	Mackerel Frozen	2,071	194,784	0.9%	84.0%
24	14.8%	Groundfish Cod Nspf Salted	1,893	196,678	0.8%	84.8%
25	15.4%	Tuna Nspf Fresh	1,782	198,460	0.8%	85.6%
26	16.0%	Tuna Albacore Frozen	1,700	200,159	0.7%	86.3%
27	16.7%	Shrimp Peeled Frozen	1,680	201,839	0.7%	87.1%
28	17.3%	Salmon Chum Frozen	1,676	203,515	0.7%	87.8%
29	17.9%	Molluscs Nspf Live/Fresh	1,643	205,159	0.7%	88.5%
30	18.5%	Shrimp Other Preparations	1,629	206,787	0.7%	89.2%
31	19.1%	Fish Nspf Frozen	1,439	208,226	0.6%	89.8%
32	19.8%	Squid Nspf Fillet Frozen	1,329	209,555	0.6%	90.4%
130	80.2%	All Others		22,265		9.6%
162	100.0%	<b>Grand Total</b>		231,820		100.0%

## 80:20 ANALYSIS OF IMPORTS FROM THE USA; CAD 000

Rank	Cum. %	Product Name	2002 FC Value	Value Cum.	%	Cum. %
1	0.6%	Lobster (Homarus Spp.) Live/Fresh/Dried/Salted/Brine	\$206,295	\$206,295	19.5%	19.5%
2	1.2%	Salmon Atlantic Fresh Farmed	\$75,264	\$281,560	7.1%	26.6%
3	1.9%	Fish Nspf Fresh	\$60,512	\$342,072	5.7%	32.4%
4	2.5%	Flatfish Halibut,Greenland Turbot Fresh	\$53,200	\$395,272	5.0%	37.4%
5	3.1%	Sticks,Type Products Not Coated Of Minced	\$49,860	\$445,131	4.7%	42.1%
6	3.7%	Salmon Nspf Canned Not In Oil	\$43,641	\$488,772	4.1%	46.2%
7	4.3%	Fish Nspf Fillet Fresh	\$40,684	\$529,456	3.8%	50.1%
8	4.9%	Groundfish Cod Nspf Frozen	\$40,216	\$569,672	3.8%	53.9%
9	5.6%	Salmon Sockeye Canned Not In Oil	\$38,847	\$608,519	3.7%	57.6%
10	6.2%	Crab Nspf Live/Fresh/Salted/Brine	\$26,481	\$635,000	2.5%	60.1%
11	6.8%	Flatfish Halibut Atlantic,Pacific Frozen	\$22,957	\$657,957	2.2%	62.3%
12	7.4%	Molluscs Nspf Live/Fresh	\$22,253	\$680,210	2.1%	64.4%
13	8.0%	Fish Nspf Minced Frozen > 6.8kg	\$22,200	\$702,410	2.1%	66.5%
14	8.6%	Shrimp Peeled Frozen	\$21,938	\$724,347	2.1%	68.5%
15	9.3%	Fish Nspf Fillet Frozen	\$17,693	\$742,041	1.7%	70.2%
16	9.9%	Fish Nspf Meat Frozen	\$17,647	\$759,688	1.7%	71.9%
17	10.5%	Shrimp Other Preparations	\$15,972	\$775,659	1.5%	73.4%
18	11.1%	Scallops Live/Fresh	\$15,109	\$790,768	1.4%	74.8%
19	11.7%	Crab King Frozen	\$14,453	\$805,221	1.4%	76.2%
20	12.3%	Fish,Shellfish Products Unfit For Human Consumption	\$14,241	\$819,462	1.3%	77.5%
21	13.0%	Herring Fresh	\$11,825	\$831,288	1.1%	78.7%
22	13.6%	Fish,Shellfish Meal Unfit For Human Consumption	\$11,344	\$842,632	1.1%	79.7%
23	14.2%	Groundfish Cod Nspf Fresh	\$10,367	\$852,999	1.0%	80.7%
24	14.8%	Lobster (Homarus Spp.) Frozen	\$9,193	\$862,192	0.9%	81.6%
25	15.4%	Shrimp Shell-On Frozen 31/40	\$8,900	\$871,092	0.8%	82.4%
26	16.0%	Scallops Frozen/Dried/Salted/Brine	\$8,521	\$879,613	0.8%	83.2%
27	16.7%	Thickeners Derived From Vegetable Products (Kelp)	\$8,185	\$887,798	0.8%	84.0%
28	17.3%	Clam Nspf Prepared/Preserved	\$7,915	\$895,713	0.7%	84.8%
29	17.9%	Tuna Albacore Frozen	\$7,543	\$903,257	0.7%	85.5%
30	18.5%	Crab Snow Frozen	\$7,308	\$910,564	0.7%	86.2%
31	19.1%	Oysters Live/Fresh/Frozen/Dried/Salted/Brine	\$6,689	\$917,253	0.6%	86.8%
32	19.8%	Tuna Nspf Fresh	\$6,652	\$923,906	0.6%	87.4%
130	80.2%	All Others		\$132,963		12.6%
162	100.0%	<b>Grand Total</b>		\$1,056,869		100.0%

## Change in U.S.A.'s Market Share of Imports

	US Share of 2000 Imports	Increase (Decrease) in Imports			US Share of 2001 Imports
		Total	From USA	From Other Countries	
Fish, Nes	38.5%	\$33,620	\$18,016	\$15,604	39.9%
Pollock	48.2%	\$14,284	\$14,706	(\$422)	62.0%
Crab, Snow/Queen	59.3%	\$12,197	\$4,694	\$7,503	39.8%
Halibut	96.5%	\$11,375	\$11,826	(\$451)	98.2%
Tuna, Skipjack	1.7%	\$10,626	(\$1,381)	\$12,007	0.2%
Salmon	70.2%	\$10,192	\$5,883	\$4,309	68.0%
Haddock	3.5%	\$9,931	\$430	\$9,501	3.8%
Salmonidae, Nes	40.5%	\$7,625	\$4,050	\$3,575	44.5%
Miscellaneous Products	44.8%	\$7,022	\$3,022	\$4,000	44.4%
Shrimp, Prawn	10.9%	\$6,749	(\$6,887)	\$13,636	9.6%
Crab, King	92.9%	\$5,890	\$6,014	(\$124)	97.2%
Other Freshwater Fish	70.7%	\$5,447	(\$359)	\$5,806	46.6%
Salmon, Atlantic	91.6%	\$3,970	\$5,924	(\$1,954)	95.7%
Cod, Atlantic	21.6%	\$3,815	\$6,514	(\$2,699)	37.8%
Tuna, Albacore	89.9%	\$3,525	\$3,327	\$198	92.2%
Other Shellfish	47.5%	\$3,132	\$787	\$2,345	44.7%
Clam	66.9%	\$2,611	(\$818)	\$3,429	53.8%
Tuna	45.6%	\$2,514	\$2,324	\$190	57.3%
Oyster	37.4%	\$2,158	\$1,609	\$549	41.2%
Geoduck	100.0%	\$2,090	\$2,074	\$16	99.9%
Sea Bass	3.7%	\$1,803	\$116	\$1,687	5.1%
Mackerel	56.8%	\$1,670	\$1,070	\$600	57.9%
Herring	69.1%	\$1,636	\$3,945	(\$2,309)	86.4%
Salmon, Coho	92.9%	\$1,186	(\$641)	\$1,827	69.0%
Cuttlefish	15.3%	\$834	(\$486)	\$1,320	7.7%
Carp	99.1%	\$783	\$799	(\$16)	100.0%
Crab, Dungeness	100.0%	\$778	\$549	\$229	83.0%
Sablefish	100.0%	\$587	(\$11)	\$598	1.5%
Hake	15.5%	\$513	(\$3)	\$516	13.8%
Shark	75.3%	\$268	\$206	\$62	75.7%
Tilapia	0.0%	\$194	\$39	\$155	1.5%
Tuna, Yellowfin	35.7%	\$138	\$125	\$13	39.7%
Monkfish	22.1%	\$79	\$387	(\$308)	45.6%
Halibut, Atlantic	71.4%	\$54	(\$463)	\$517	11.9%
Snails	24.5%	\$34	(\$299)	\$333	1.9%
Sardine	3.1%	(\$16)	\$584	(\$600)	11.4%
Lingcod	100.0%	(\$20)	(\$20)	\$0	#DIV/0!
Trout	63.4%	(\$22)	(\$526)	\$504	54.9%
Tuna, Skipjack/Bonito	5.4%	(\$130)	\$0	(\$130)	25.0%
Eel	30.3%	(\$242)	(\$212)	(\$30)	22.5%
Other Groundfish	106.1%	(\$258)	(\$446)	\$188	91.5%
Dogfish	12.2%	(\$266)	\$22	(\$288)	31.6%
Ocean Perch	98.6%	(\$300)	(\$255)	(\$45)	99.4%
Anchovy	9.7%	(\$567)	(\$21)	(\$546)	10.6%
Octopus	10.8%	(\$659)	(\$213)	(\$446)	6.8%
Mussel	15.0%	(\$661)	\$163	(\$824)	18.4%
Plaice	67.3%	(\$771)	(\$470)	(\$301)	93.6%
Patagonian Toothfish	4.7%	(\$777)	\$222	(\$999)	9.4%
Pacific Perch	2.0%	(\$1,151)	\$23	(\$1,174)	65.3%
Other Freshwater Fish	8.7%	(\$1,720)	(\$217)	(\$1,503)	6.8%
Flatfish	22.8%	(\$1,759)	\$48	(\$1,807)	37.6%
Greenland Turbot	0.1%	(\$1,776)	\$352	(\$2,128)	5.6%
Salmon, Chinook (Spring)	18.9%	(\$1,870)	(\$120)	(\$1,750)	24.8%
Scallop	42.1%	(\$1,938)	\$213	(\$2,151)	44.7%
Squid	16.4%	(\$2,270)	\$426	(\$2,696)	18.8%
Sole	8.8%	(\$2,369)	\$114	(\$2,483)	10.0%
Halibut, Pacific	86.4%	(\$4,900)	(\$2,190)	(\$2,710)	94.7%
Lobster	99.3%	(\$5,288)	(\$5,156)	(\$132)	99.3%
Salmon, Chum	94.4%	(\$5,328)	(\$5,853)	\$525	86.3%
Lobster, Rock	2.0%	(\$7,484)	(\$465)	(\$7,019)	0.4%
Crab	79.0%	(\$7,738)	(\$9,818)	\$2,080	68.9%
Salmon, Pink	90.5%	(\$9,313)	(\$8,369)	(\$944)	90.8%
Cod	62.5%	(\$14,808)	(\$6,243)	(\$8,565)	67.8%
Salmon, Sockeye	96.1%	(\$26,947)	(\$25,310)	(\$1,637)	97.5%
<b>Grand Total</b>	<b>43.4%</b>	<b>\$67,982</b>	<b>\$23,351</b>	<b>\$44,631</b>	<b>43.1%</b>



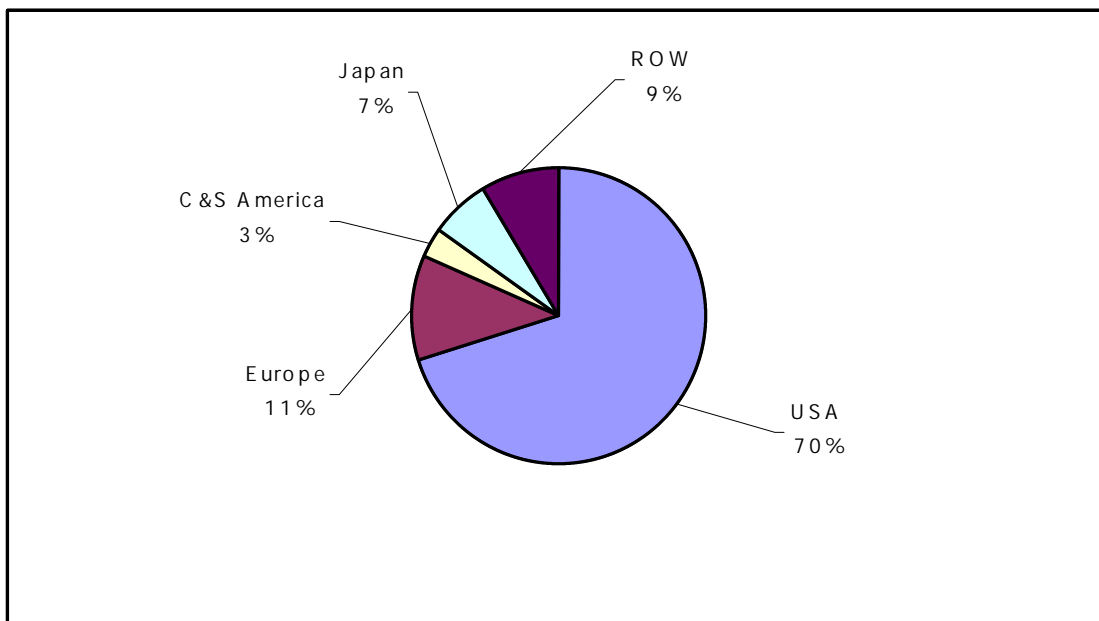
## CANADA'S SEAFOOD EXPORTS

### By Country or Region

#### TRENDS IN EXPORTS BY COUNTRY OR REGION; TONNES

Tonnes	1997	1998	1999	2000	2001	2002 FC	CGR %
USA	293,218	327,811	338,445	345,540	368,553	385,233	5.7%
Europe	63,211	65,123	63,746	54,134	68,511	62,828	0.8%
C&S America	20,493	18,262	19,868	15,709	19,896	17,722	-1.5%
Japan	68,172	61,128	50,795	47,042	45,342	36,572	-11.5%
ROW	27,543	28,148	33,458	34,700	45,634	46,717	11.7%
Total	472,637	500,472	506,312	497,125	547,936	549,072	3.1%

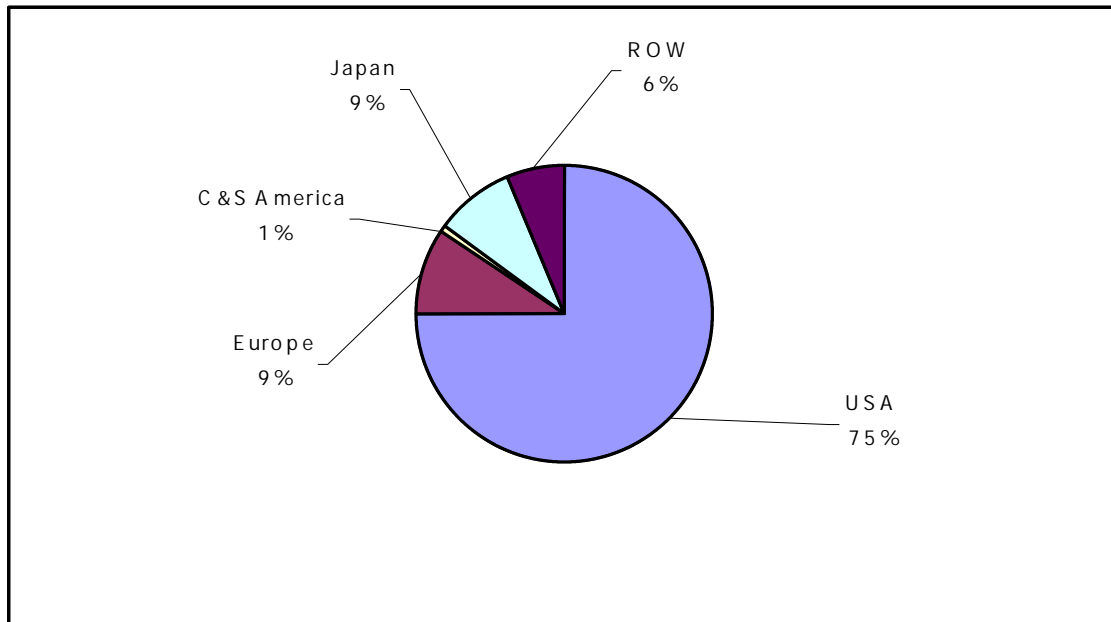
#### 2002 FC EXPORTS BY COUNTRY OR REGION; TONNES



## TRENDS IN EXPORTS BY COUNTRY OR REGION; CAD 000

Dollars	1997	1998	1999	2000	2001	2002 FC	CGR %
USA	\$1,851,771	\$2,135,453	\$2,581,440	\$2,899,319	\$3,065,938	\$3,464,444	13.5%
Europe	\$324,905	\$354,749	\$390,008	\$352,178	\$410,471	\$417,031	5.5%
C&S America	\$50,563	\$45,777	\$52,635	\$36,029	\$44,444	\$39,294	-2.9%
Japan	\$613,051	\$489,341	\$480,888	\$526,604	\$418,358	\$400,012	-7.5%
ROW	\$197,310	\$194,494	\$237,312	\$260,680	\$272,778	\$297,651	8.8%
Total	\$3,037,600	\$3,219,814	\$3,742,283	\$4,074,810	\$4,211,989	\$4,618,431	8.8%

## 2002 FC EXPORTS BY COUNTRY OR REGION; CAD 000

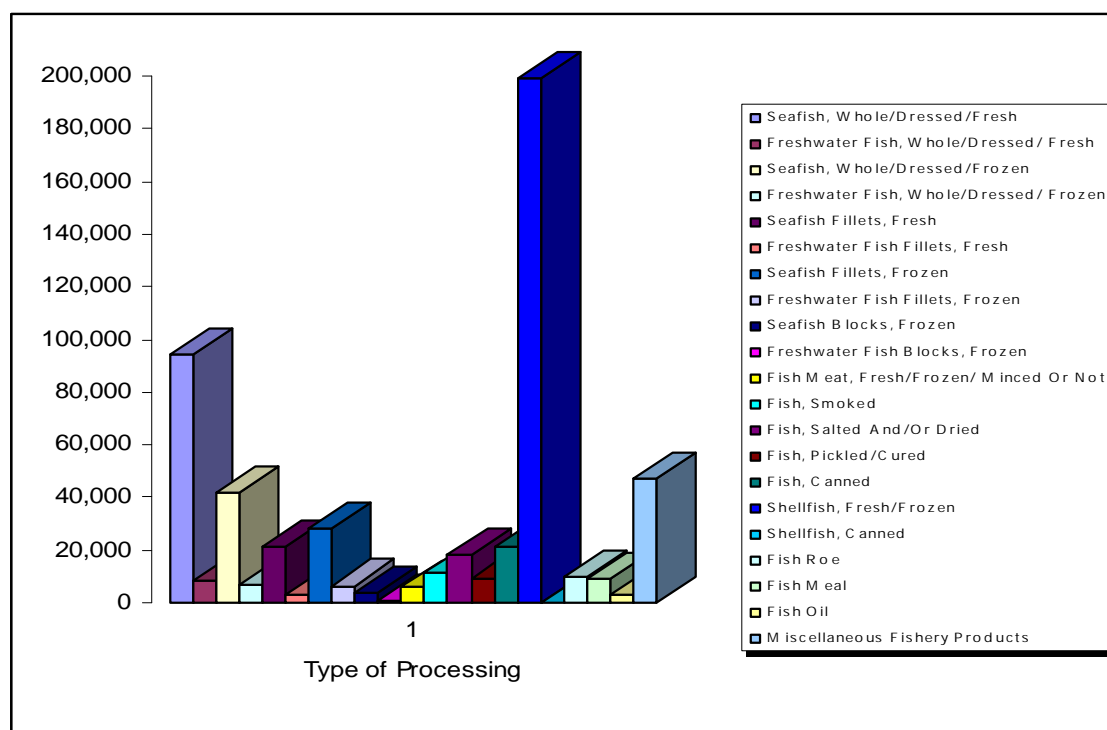


## By Type of Processing

### TRENDS IN EXPORTS BY TYPE OF PROCESSING; TONNES

Tonnes	1997	1998	1999	2000	2001	2002 FC	CGR %
Seafish, Whole/Dressed/Fresh	90,534	98,532	92,450	88,983	96,294	93,950	0.9%
Freshwater Fish, Whole/Dressed/ Fresh	7,406	7,751	8,103	8,049	7,734	8,095	1.9%
Seafish, Whole/Dressed/Frozen	50,765	56,575	42,144	38,525	49,776	41,549	-2.0%
Freshwater Fish, Whole/Dressed/ Frozen	6,290	7,237	7,516	5,753	6,751	6,541	1.9%
Seafish Fillets, Fresh	5,709	5,711	6,497	6,303	24,245	20,992	56.4%
Freshwater Fish Fillets, Fresh	2,791	3,290	3,215	3,348	2,895	3,188	3.3%
Seafish Fillets, Frozen	29,373	33,200	31,004	25,552	30,591	28,380	0.3%
Freshwater Fish Fillets, Frozen	5,031	5,684	6,265	5,143	6,567	6,497	6.4%
Seafish Blocks, Frozen	4,040	4,246	8,286	2,535	3,813	3,935	16.9%
Freshwater Fish Blocks, Frozen	1,466	1,664	1,718	1,432	665	839	-5.5%
Fish Meat, Fresh/Frozen/ Minced Or Not	7,284	7,809	11,264	14,354	294	5,971	382.3%
Fish, Smoked	13,330	12,542	11,111	10,571	13,016	11,334	-2.4%
Fish, Salted And/Or Dried	28,748	29,528	27,969	20,624	21,085	18,322	-5.4%
Fish, Pickled/Cured	374	1,654	2,798	8,732	6,144	9,526	12.7%
Fish, Canned	15,602	16,140	16,992	19,387	19,747	21,035	4.2%
Shellfish, Fresh/Frozen	135,188	140,743	166,068	171,938	184,977	199,015	8.2%
Shellfish, Canned	810	534	791	485	362	313	-12.7%
Fish Roe	10,698	10,353	9,680	10,408	9,662	9,555	-2.1%
Fish Meal	10,970	8,148	8,774	6,752	11,927	9,470	3.0%
Fish Oil	6,705	4,116	4,703	4,753	3,898	3,342	-11.1%
Miscellaneous Fishery Products	39,523	45,015	38,964	43,498	47,493	47,226	4.1%
Total	472,637	500,472	506,312	497,125	547,936	549,072	

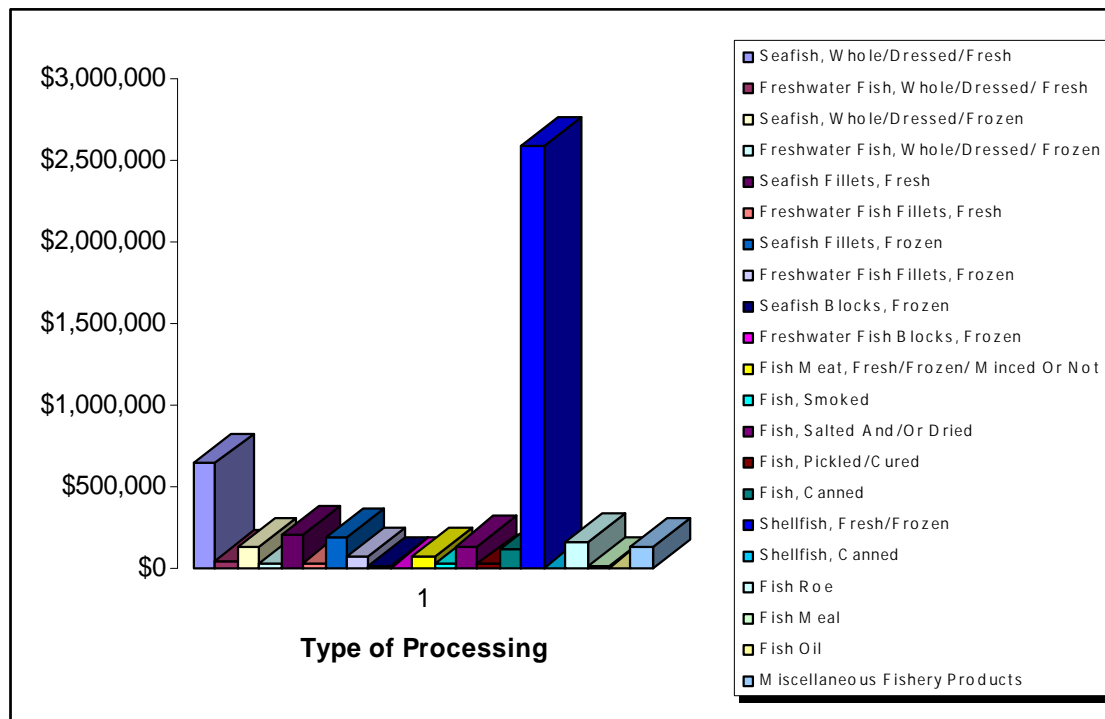
### 2002 FC EXPORTS BY TYPE OF PROCESSING; TONNES



## TRENDS IN EXPORTS BY TYPE OF PROCESSING; CAD 000

Dollars	1997	1998	1999	2000	2001	2002 FC	CGR %
Seafish, Whole/Dressed/Fresh	\$482,031	\$526,105	\$568,010	\$565,896	\$623,373	\$649,826	6.2%
Freshwater Fish, Whole/Dressed/ Fresh	\$32,607	\$37,693	\$42,214	\$42,099	\$42,097	\$46,358	7.5%
Seafish, Whole/Dressed/Frozen	\$187,899	\$157,635	\$134,484	\$140,272	\$157,283	\$131,936	-6.1%
Freshwater Fish, Whole/Dressed/ Frozen	\$16,835	\$20,450	\$21,804	\$19,050	\$22,309	\$22,954	7.1%
Seafish Fillets, Fresh	\$39,033	\$44,452	\$46,675	\$49,147	\$242,191	\$207,603	80.5%
Freshwater Fish Fillets, Fresh	\$25,876	\$32,848	\$31,088	\$31,088	\$29,875	\$32,026	5.0%
Seafish Fillets, Frozen	\$143,830	\$173,179	\$178,361	\$171,290	\$170,810	\$183,115	5.3%
Freshwater Fish Fillets, Frozen	\$56,961	\$62,743	\$64,935	\$61,484	\$72,791	\$72,903	5.4%
Seafish Blocks, Frozen	\$10,361	\$9,977	\$22,529	\$6,177	\$9,723	\$10,231	22.4%
Freshwater Fish Blocks, Frozen	\$4,101	\$4,947	\$5,431	\$4,450	\$2,170	\$2,912	-0.9%
Fish Meat, Fresh/Frozen/ Minced Or Not	\$62,126	\$74,940	\$110,527	\$146,417	\$850	\$63,650	1477.9%
Fish, Smoked	\$32,559	\$28,675	\$28,435	\$27,395	\$33,665	\$30,425	-0.6%
Fish, Salted And/Or Dried	\$134,618	\$159,330	\$159,779	\$137,066	\$131,537	\$135,938	-0.3%
Fish, Pickled/Cured	\$1,821	\$6,440	\$11,517	\$27,890	\$19,583	\$30,542	13.1%
Fish, Canned	\$93,375	\$111,989	\$101,952	\$107,345	\$111,729	\$114,897	3.5%
Shellfish, Fresh/Frozen	\$1,458,588	\$1,521,215	\$1,972,523	\$2,244,661	\$2,259,045	\$2,588,514	12.6%
Shellfish, Canned	\$8,424	\$8,359	\$8,675	\$4,554	\$4,079	\$3,070	-15.9%
Fish Roe	\$143,875	\$131,177	\$124,590	\$161,333	\$147,519	\$152,932	2.2%
Fish Meal	\$10,735	\$9,198	\$7,024	\$6,663	\$10,865	\$8,215	-0.9%
Fish Oil	\$6,789	\$5,616	\$3,472	\$4,864	\$3,868	\$2,944	-11.9%
Miscellaneous Fishery Products	\$85,156	\$92,846	\$98,258	\$115,669	\$116,627	\$127,441	8.5%
Total	\$3,037,600	\$3,219,814	\$3,742,283	\$4,074,810	\$4,211,989	\$4,618,431	

## 2002 FC EXPORTS BY TYPE OF PROCESSING; CAD 000

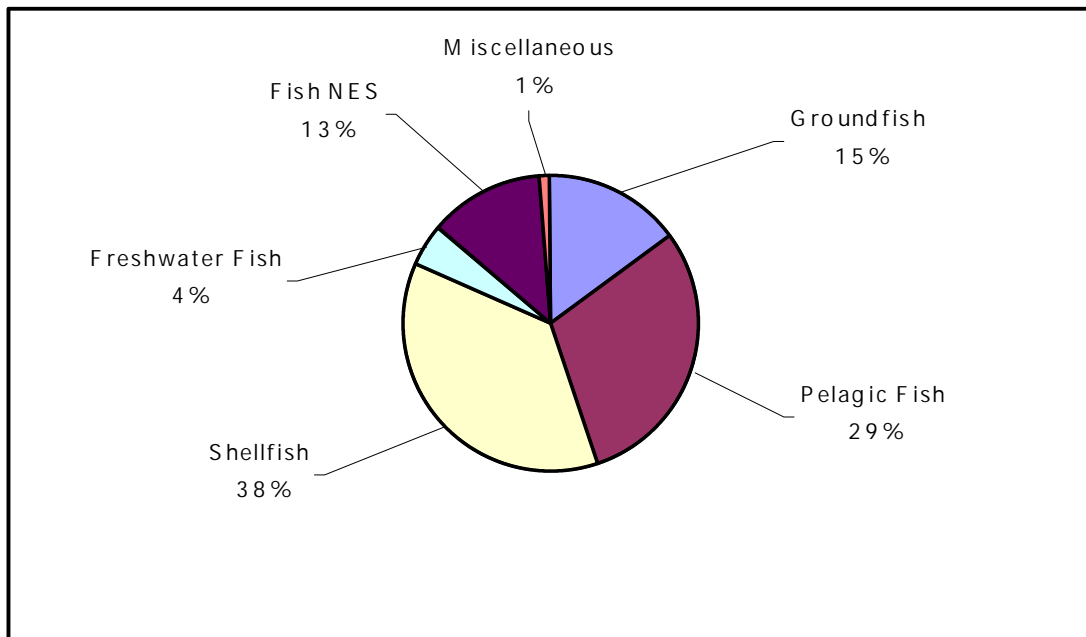


## By Species Group

### TRENDS IN EXPORTS BY SPECIES GROUP; TONNES

Tonnes	1997	1998	1999	2000	2001	2002 FC	CGR %
Groundfish	74,305	77,869	79,439	81,777	81,723	84,646	2.7%
Pelagic Fish	159,159	174,661	150,941	140,022	177,174	160,809	1.2%
Shellfish	137,671	143,476	169,228	175,147	188,845	203,079	8.2%
Freshwater Fish	22,678	25,374	26,863	23,346	23,669	24,372	1.8%
Fish NES	76,635	78,859	76,938	73,047	71,810	70,819	-1.5%
Miscellaneous	2,189	233	2,903	3,786	4,715	5,347	225.0%
Total	472,637	500,472	506,312	497,125	547,936	549,072	3.1%

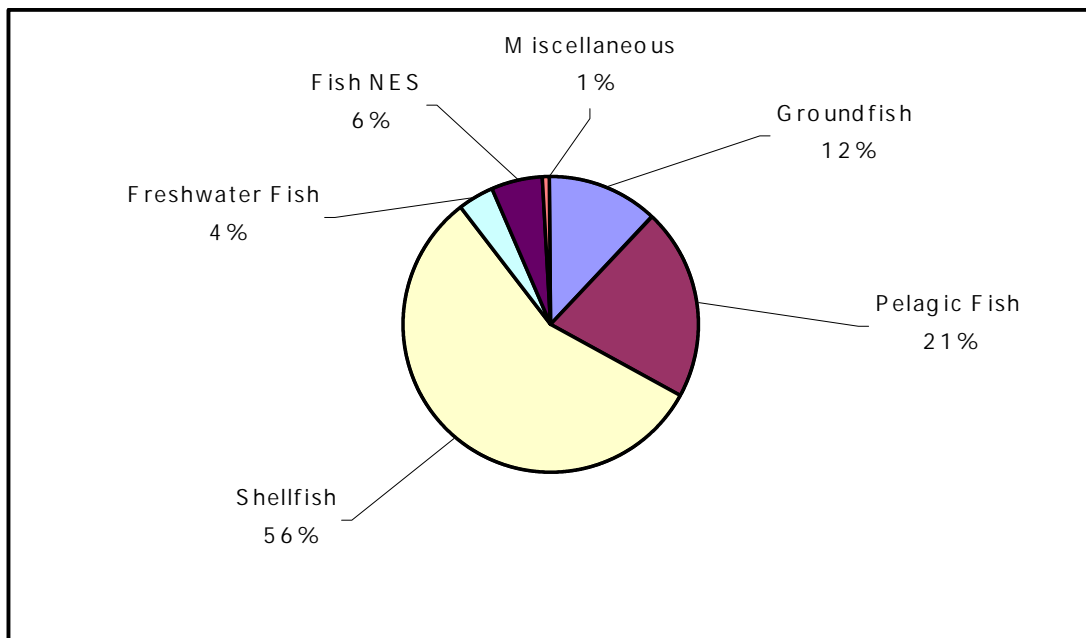
### 2002 FC EXPORTS BY SPECIES GROUP; TONNES



## TRENDS IN EXPORTS BY SPECIES GROUP; CAD 000

Dollars	1997	1998	1999	2000	2001	2002 FC	CGR %
Groundfish	\$396,486	\$453,384	\$517,244	\$522,972	\$499,955	\$560,966	7.5%
Pelagic Fish	\$792,474	\$805,149	\$762,886	\$796,028	\$1,021,592	\$970,360	4.8%
Shellfish	\$1,485,146	\$1,549,655	\$2,000,095	\$2,272,054	\$2,286,870	\$2,616,518	12.4%
Freshwater Fish	\$134,849	\$157,861	\$165,748	\$155,433	\$162,779	\$171,364	5.2%
Fish NES	\$217,522	\$243,464	\$282,988	\$306,220	\$221,120	\$275,248	6.6%
Miscellaneous	\$11,123	\$10,301	\$13,322	\$22,103	\$19,673	\$23,975	19.7%
Total	\$3,037,600	\$3,219,814	\$3,742,283	\$4,074,810	\$4,211,989	\$4,618,431	8.8%

## 2002 FC EXPORTS BY SPECIES GROUP; CAD 000

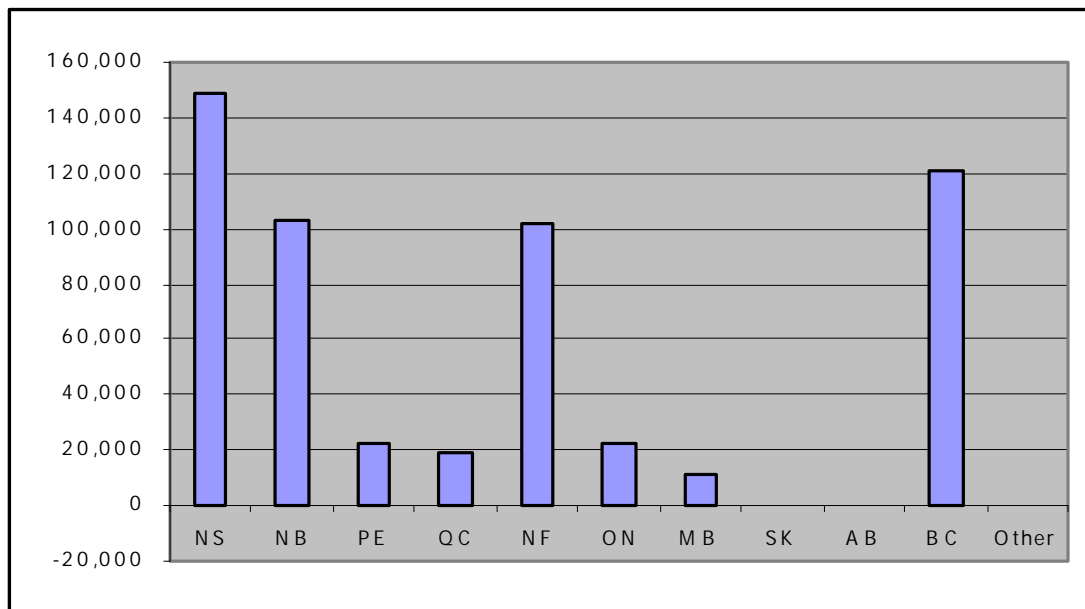


## By Province

### TRENDS IN EXPORTS BY PROVINCE; TONNES

Tonnes	1997	1998	1999	2000	2001	2002 FC	CGR %
Nova Scotia	119,105	127,061	129,637	132,579	145,591	148,342	4.5%
New Brunswick	74,572	78,732	80,864	89,112	99,931	102,972	6.7%
Prince Edward Island	15,507	14,719	17,148	21,093	20,166	22,434	n/a
Quebec	23,772	20,119	20,265	20,618	19,982	18,827	-4.4%
Newfoundland	72,271	90,268	96,743	87,162	96,365	102,086	7.7%
Ontario	21,620	27,216	23,111	21,793	22,778	22,372	1.6%
Manitoba	8,006	9,286	9,147	10,360	9,852	10,760	6.4%
Saskatchewan	136	674	470	444	542	628	79.5%
Alberta	514	530	873	301	214	238	-3.1%
British Columbia	137,023	131,866	128,041	113,607	132,502	120,418	-2.1%
Other	111	1	13	56	13	-4	245.6%
Total	472,637	500,472	506,312	497,125	547,936	549,072	3.1%

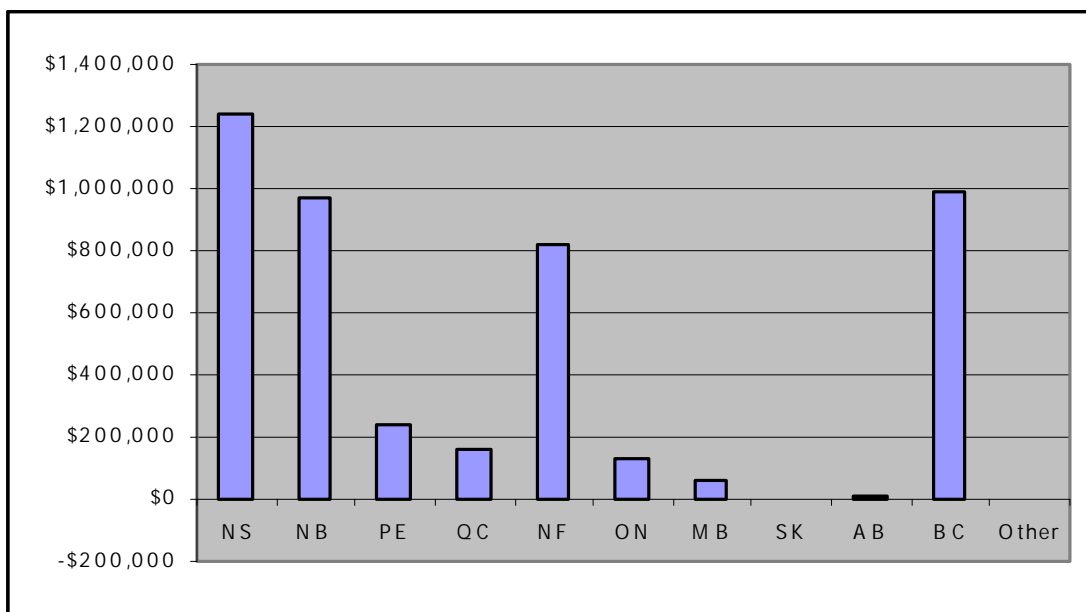
### 2002 FC EXPORTS BY PROVINCE; TONNES



## TRENDS IN EXPORTS BY PROVINCE; CAD 000

Dollars	1997	1998	1999	2000	2001	2002 FC	CGR %
Nova Scotia	\$833,624	\$896,136	\$999,664	\$1,098,088	\$1,137,089	\$1,235,585	8.2%
New Brunswick	\$564,693	\$558,069	\$681,471	\$818,666	\$882,870	\$970,239	11.8%
Prince Edward Island	\$116,231	\$130,476	\$187,881	\$220,432	\$194,605	\$243,936	n/a
Quebec	\$179,593	\$153,531	\$166,069	\$180,616	\$152,471	\$158,308	-1.9%
Newfoundland	\$365,079	\$490,416	\$679,320	\$669,366	\$677,225	\$817,254	18.6%
Ontario	\$107,350	\$126,833	\$121,051	\$120,028	\$125,624	\$129,100	4.0%
Manitoba	\$38,555	\$44,436	\$47,427	\$53,614	\$58,961	\$63,596	10.6%
Saskatchewan	\$926	\$5,058	\$3,066	\$2,937	\$3,930	\$4,350	89.4%
Alberta	\$1,161	\$1,450	\$2,338	\$6,256	\$4,978	\$6,969	54.7%
British Columbia	\$829,302	\$813,293	\$853,823	\$904,131	\$974,145	\$989,096	3.6%
Other	\$1,086	\$116	\$173	\$676	\$91	-\$1	12.7%
Total	\$3,037,600	\$3,219,814	\$3,742,283	\$4,074,810	\$4,211,989	\$4,618,431	8.8%

## 2002 FC EXPORTS BY PROVINCE; CAD 000





## 80:20 Analysis of Exports to the U.S.A.

### 80:20 ANALYSIS OF EXPORTS TO THE USA; TONNES

Rank	Cum. %	Product Name	2002 FC Tonnes	Tonnes Cum.	%	Cum. %
1	0.3%	Salmon Atlantic Fresh Farmed	52,842	52,842	13.7%	13.7%
2	0.5%	Crab Snow Frozen	40,855	93,697	10.6%	24.3%
3	0.8%	Fish,Shellfish Products Unfit For Human Consumption	27,647	121,344	7.2%	31.5%
4	1.0%	Lobster (Homarus Spp.) Live	25,634	146,977	6.7%	38.2%
5	1.3%	Salmon Atlantic Fillet Fresh Farmed	15,343	162,321	4.0%	42.1%
6	1.6%	Mussels Live/Fresh Farmed	9,888	172,209	2.6%	44.7%
7	1.8%	Groundfish Haddock Fresh	9,264	181,473	2.4%	47.1%
8	2.1%	Herring,Pilchard Meal Unfit For Human Consumption	8,400	189,873	2.2%	49.3%
9	2.3%	Lobster (Homarus Spp.) Frozen	8,201	198,074	2.1%	51.4%
10	2.6%	Groundfish Hake Fresh	7,773	205,847	2.0%	53.4%
11	2.9%	Shrimp Frozen Other Preparations	6,192	212,039	1.6%	55.0%
12	3.1%	Groundfish Cod Atlantic Fillet Frozen	6,111	218,150	1.6%	56.6%
13	3.4%	Marine Fish Nspf Fillet Fresh	5,148	223,298	1.3%	58.0%
14	3.6%	Crab Nspf Live/Fresh/Salted/Brine	5,133	228,431	1.3%	59.3%
15	3.9%	Seaweeds And Other Algae	5,049	233,480	1.3%	60.6%
16	4.2%	Flatfish Halibut Pacific Fresh	5,046	238,526	1.3%	61.9%
17	4.4%	Clam Nspf Live/Fresh	4,661	243,187	1.2%	63.1%
18	4.7%	Sardine Canned In Oil Smoked Not Skin/Bone Value > \$1/Kg	4,652	247,839	1.2%	64.3%
19	4.9%	Sticks,Type Products Coated Cooked/Frozen Of Minced	4,530	252,370	1.2%	65.5%
20	5.2%	Lobster Nspf Meat Cooked Frozen	4,479	256,849	1.2%	66.7%
21	5.5%	Herring Frozen	4,156	261,005	1.1%	67.8%
22	5.7%	Sticks,Type Products Not Coated Not Minced Not > 7kg	4,020	265,025	1.0%	68.8%
23	6.0%	Capelin Frozen	3,895	268,919	1.0%	69.8%
24	6.3%	Fish Nspf Fillet Dried/Salted/Brine	3,893	272,812	1.0%	70.8%
25	6.5%	Crabmeat Nspf Frozen	3,810	276,622	1.0%	71.8%
26	6.8%	Scallops Live/Fresh	3,666	280,288	1.0%	72.8%
27	7.0%	Groundfish Ocean Perch Atlantic Fillet Frozen	3,653	283,942	0.9%	73.7%
28	7.3%	Whitefish Fresh	3,594	287,536	0.9%	74.6%
29	7.6%	Marine Fish Nspf Fresh	3,441	290,977	0.9%	75.5%
30	7.8%	Marine Fish Nspf Fillet Frozen	3,420	294,397	0.9%	76.4%
31	8.1%	Flatfish Flounder Fillet Frozen	3,168	297,565	0.8%	77.2%
32	8.3%	Scallops Frozen/Dried/Salted/Brine	3,162	300,726	0.8%	78.1%
33	8.6%	Herring Prepared/Preserved	2,984	303,710	0.8%	78.8%
34	8.9%	Fish Nspf Minced Frozen > 6.8kg	2,915	306,625	0.8%	79.6%
350	91.1%	All Others		78,608		20.4%
384	100.0%	<b>Grand Total</b>		385,233		100.0%

## 80:20 ANALYSIS OF EXPORTS TO THE USA; CAD 000

Rank	Cum. %	Product Name	2002 FC Value	Value Cum.	%	Cum. %
1	0.3%	Crab Snow Frozen	\$490,998	\$490,998	14.2%	14.2%
2	0.5%	Lobster (Homarus Spp.) Live	\$461,816	\$952,814	13.3%	27.5%
3	0.8%	Salmon Atlantic Fresh Farmed	\$421,398	\$1,374,212	12.2%	39.7%
4	1.0%	Lobster (Homarus Spp.) Frozen	\$313,240	\$1,687,451	9.0%	48.7%
5	1.3%	Salmon Atlantic Fillet Fresh Farmed	\$181,126	\$1,868,578	5.2%	53.9%
6	1.6%	Lobster Nspf Meat Cooked Frozen	\$169,997	\$2,038,574	4.9%	58.8%
7	1.8%	Crabmeat Nspf Frozen	\$61,438	\$2,100,012	1.8%	60.6%
8	2.1%	Flatfish Halibut Pacific Fresh	\$60,878	\$2,160,890	1.8%	62.4%
9	2.3%	Shrimp Frozen Other Preparations	\$60,282	\$2,221,172	1.7%	64.1%
10	2.6%	Groundfish Cod Atlantic Fillet Frozen	\$57,435	\$2,278,607	1.7%	65.8%
11	2.9%	Scallops Frozen/Dried/Salted/Brine	\$53,313	\$2,331,920	1.5%	67.3%
12	3.1%	Scallops Live/Fresh	\$53,149	\$2,385,069	1.5%	68.8%
13	3.4%	Crab Nspf Live/Fresh/Salted/Brine	\$46,478	\$2,431,547	1.3%	70.2%
14	3.6%	Marine Fish Nspf Fillet Fresh	\$44,711	\$2,476,258	1.3%	71.5%
15	3.9%	Clam Nspf Live/Fresh	\$39,680	\$2,515,938	1.1%	72.6%
16	4.2%	Groundfish Haddock Fresh	\$36,665	\$2,552,603	1.1%	73.7%
17	4.4%	Pickrel Fillet Frozen	\$34,020	\$2,586,623	1.0%	74.7%
18	4.7%	Crabmeat Snow (Opilio) Frozen	\$26,540	\$2,613,163	0.8%	75.4%
19	4.9%	Mussels Live/Fresh Farmed	\$26,169	\$2,639,332	0.8%	76.2%
20	5.2%	Crab Nspf Frozen	\$25,888	\$2,665,219	0.7%	76.9%
21	5.5%	Crabmeat Snow Other Frozen	\$25,523	\$2,690,742	0.7%	77.7%
22	5.7%	Fish Nspf Fillet Dried/Salted/Brine	\$23,817	\$2,714,559	0.7%	78.4%
23	6.0%	Flatfish Flounder Fillet Frozen	\$23,629	\$2,738,187	0.7%	79.0%
24	6.3%	Sardine Canned In Oil Smoked Not Skin/Bone Value > \$1/Kg	\$21,384	\$2,759,571	0.6%	79.7%
360	93.8%	All Others		\$704,873		20.3%
394	102.6%	<b>Grand Total</b>		\$3,464,444		100.0%

## CANADA'S DOMESTIC MARKET

### Sources & Uses of Seafood Products

#### 2002 FC OF SOURCES & USES OF SEAFOOD PRODUCTS IN CANADA; TONNES

Tonnes	Fish Product Type			Total
	Dressed Fish <sup>1</sup>	Converted Fish <sup>2</sup>	Fish By-Products	
Canadian Domestic Fish Landings				1,243,678
<u>1° PROCESSING STAGE</u>				
Opening Position after Evisceration of Domestic Catch	897,525		346,153	1,243,678
(-) Exports of Whole Fish, Fresh or Frozen	(150,134)			
(=) Domestic Position after Entrails Removal & Exports	747,391			
(+) Imports of Whole Fish, Fresh or Frozen	103,649			
(=) Domestic Position after Entrails Removal & Imports	851,039		346,153	1,197,192
(±) Removal of Head, Tail, etc. (where applicable)	(212,760)		212,760	
(=) Domestic Position after 1° Processing	638,280		558,913	1,197,192
<u>2° PROCESSING STAGE</u>				
Opening Position before Triage & Converting	638,280		558,913	1,197,192
(±) Weight shift due to Triage	(95,742)		95,742	
Position after Triage	143,613	398,925	654,655	1,197,192
(+) Imports of Shellfish & Converted Seafood Products		258,065	238,026	
(-) Moisture & Other Losses during Converting		(79,785)	(621,922)	
(=) Domestic Position after Imports & Converting		577,205	270,759	
(-) Exports of Shellfish & Converted Seafood Products		(338,901)	(60,037)	
(=) Domestic Position after Triage & Converting	143,613	238,304	210,722	592,639
<u>DOMESTIC DISTRIBUTION STAGE</u>				
Opening Position before Distribution	143,613	238,304	210,722	592,639
(-) Distribution Losses	(14,002)	(23,235)	(20,545)	
(=) Sales at Retail	129,611	215,069	190,177	534,857

<sup>1</sup> Includes fresh and frozen whole fish, cleaned, head and tail removed if applicable

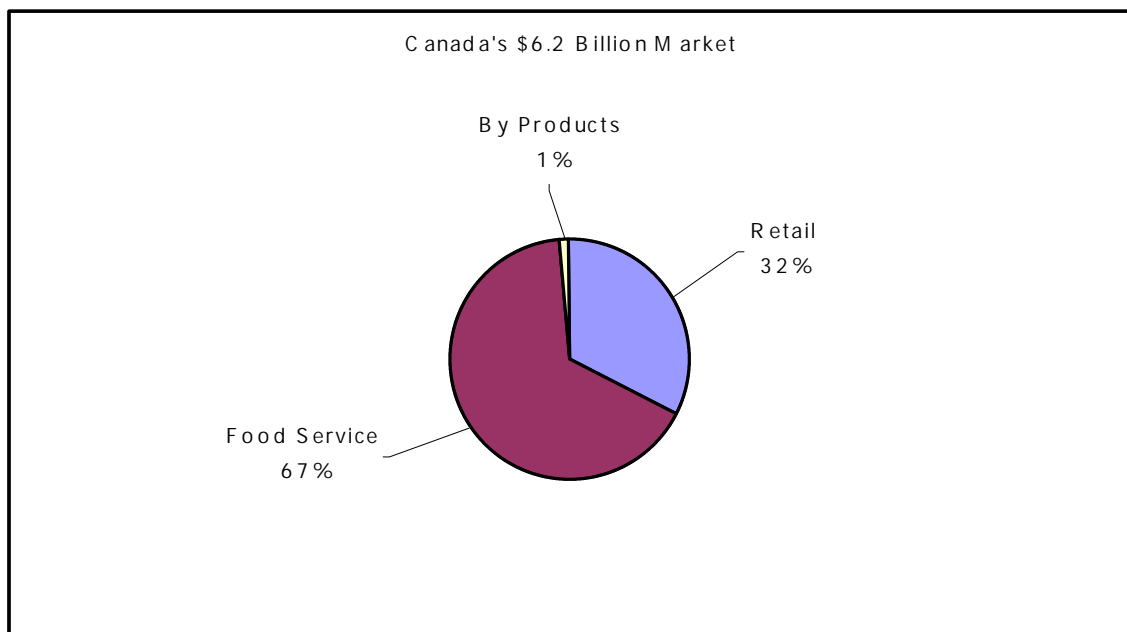
<sup>2</sup> Includes all fish and seafood products that have been processed beyond entrails and head & tail removal stage, including e.g. filleting, canning, smoking and pre-cooking

## Canada's Retail Markets

### TRENDS IN CANADA'S RETAIL MARKETS

	1997	1998	1999	2000	2001	2002 FC	CGR %
Population (000)	29,987	30,248	30,499	30,770	31,082	31,341	0.9%
Per Capita Seafood Consumption (Kg)	8.60	8.68	9.97	10.07	10.53	11.00	5.2%
Fish Tonnes Consumed	257,890	262,554	304,077	309,851	327,417	344,690	6.1%
Retail Fish Product Spending / Capita	\$52.33	\$53.79	\$56.75	\$61.29	\$62.05	\$64.30	
Retail	\$1,569,149	\$1,627,125	\$1,730,862	\$1,885,910	\$1,928,478	\$2,015,269	5.2%
Food Service	\$2,446,506	\$2,451,991	\$3,280,864	\$3,504,288	\$3,775,787	\$4,099,802	11.4%
By Products	\$82,800	\$85,419	\$89,679	\$85,990	\$90,366	\$92,992	2.4%
Yearly Retail Spending Total	\$4,098,455	\$4,164,536	\$5,101,404	\$5,476,188	\$5,794,631	\$6,208,063	8.9%

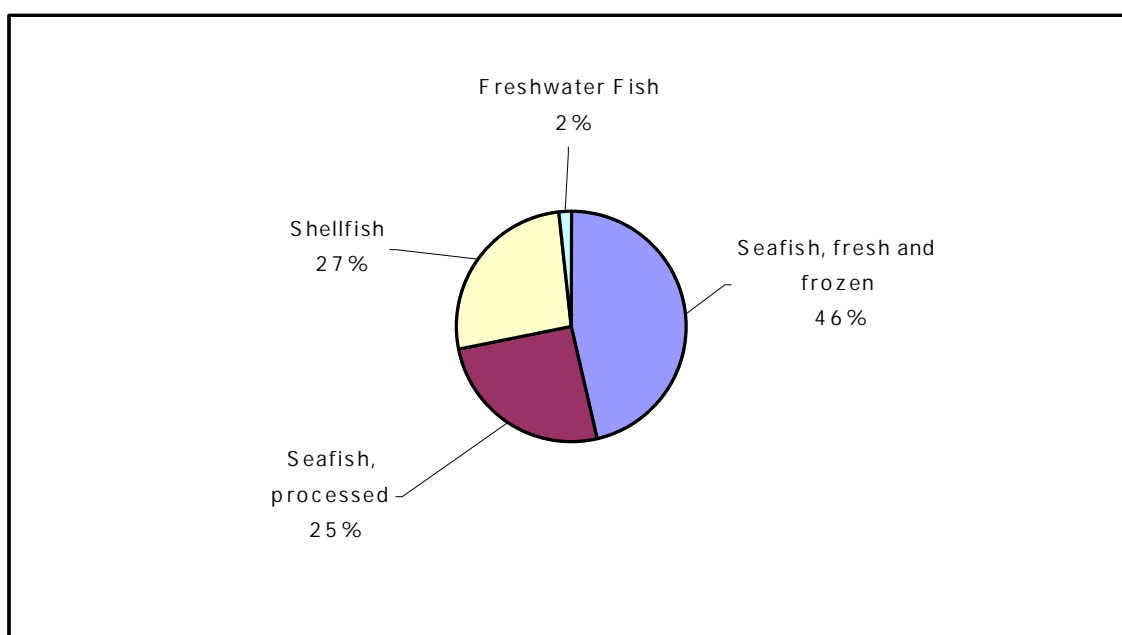
### 2002 FC COMPONENTS OF CANADA'S RETAIL MARKETS



## TRENDS IN PER CAPITA CONSUMPTION

<b>Kilograms</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002 FC</b>	<b>CGR %</b>
Seafish, fresh and frozen	4.29	4.01	4.97	4.80	4.95	5.11	4.1%
Seafish, processed	2.26	2.38	2.52	2.59	2.69	2.80	4.4%
Shellfish	1.86	2.1	2.3	2.50	2.71	2.92	9.4%
Freshwater Fish	0.19	0.19	0.18	0.18	0.18	0.18	-1.3%
Total	8.6	8.68	9.97	10.07	10.53	11.00	5.2%

## 2002 FC PER CAPITA CONSUMPTION



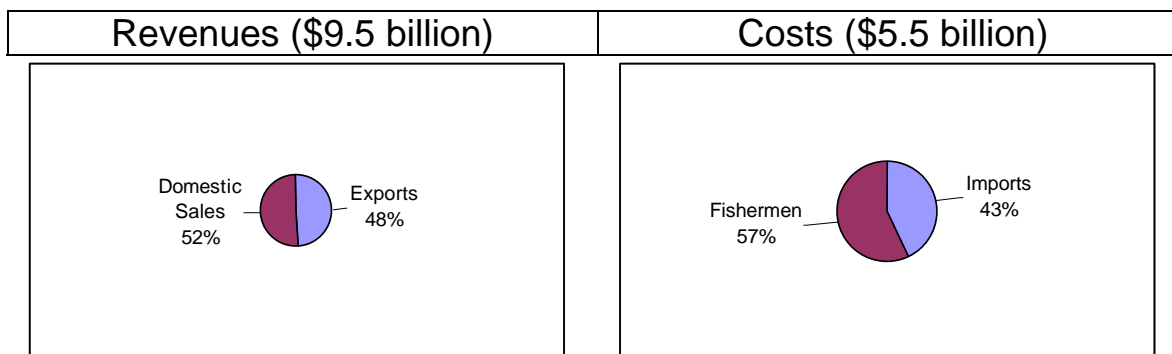
## CANADA'S SEAFOOD PROCESSING COMPANIES

### Revenues & Costs

#### TRENDS IN PROCESSORS' REVENUES AND COSTS; CAD 000

	1997	1998	1999	2000	2001	2002 FC
Export Revenues	\$3,037,600	\$3,219,814	\$3,742,283	\$4,074,810	\$4,211,989	\$4,618,431
Import Expense	\$1,577,563	\$1,794,431	\$2,008,219	\$2,103,525	\$2,171,507	\$2,380,144
Gross Margin on International Trade	\$1,460,037	\$1,425,383	\$1,734,064	\$1,971,285	\$2,040,482	\$2,238,288
Gross Margin %	48.1%	44.3%	46.3%	48.4%	48.4%	48.5%
Revenues from Domestic Sales	\$3,243,376	\$3,295,670	\$4,037,075	\$4,333,666	\$4,585,671	\$4,912,846
Purchases from Fishermen	\$2,088,344	\$2,122,395	\$2,590,121	\$2,773,652	\$2,933,813	\$3,140,814
Gross Margin on Domestic Trade	\$1,155,032	\$1,173,275	\$1,446,955	\$1,560,015	\$1,651,858	\$1,772,032
Gross Margin %	35.6%	35.6%	35.8%	36.0%	36.0%	36.1%
Total Yearly Processor Revenues	\$6,280,976	\$6,515,484	\$7,779,358	\$8,408,476	\$8,797,660	\$9,531,278
Purchases	\$3,665,907	\$3,916,826	\$4,598,340	\$4,877,177	\$5,105,320	\$5,520,958
Gross Margin on All Trade	\$2,615,069	\$2,598,658	\$3,181,019	\$3,531,300	\$3,692,340	\$4,010,320
Gross Margin %	41.6%	39.9%	40.9%	42.0%	42.0%	42.1%

#### 2002 FC PROCESSORS' REVENUES AND COSTS; CAD 000



## Size and Location

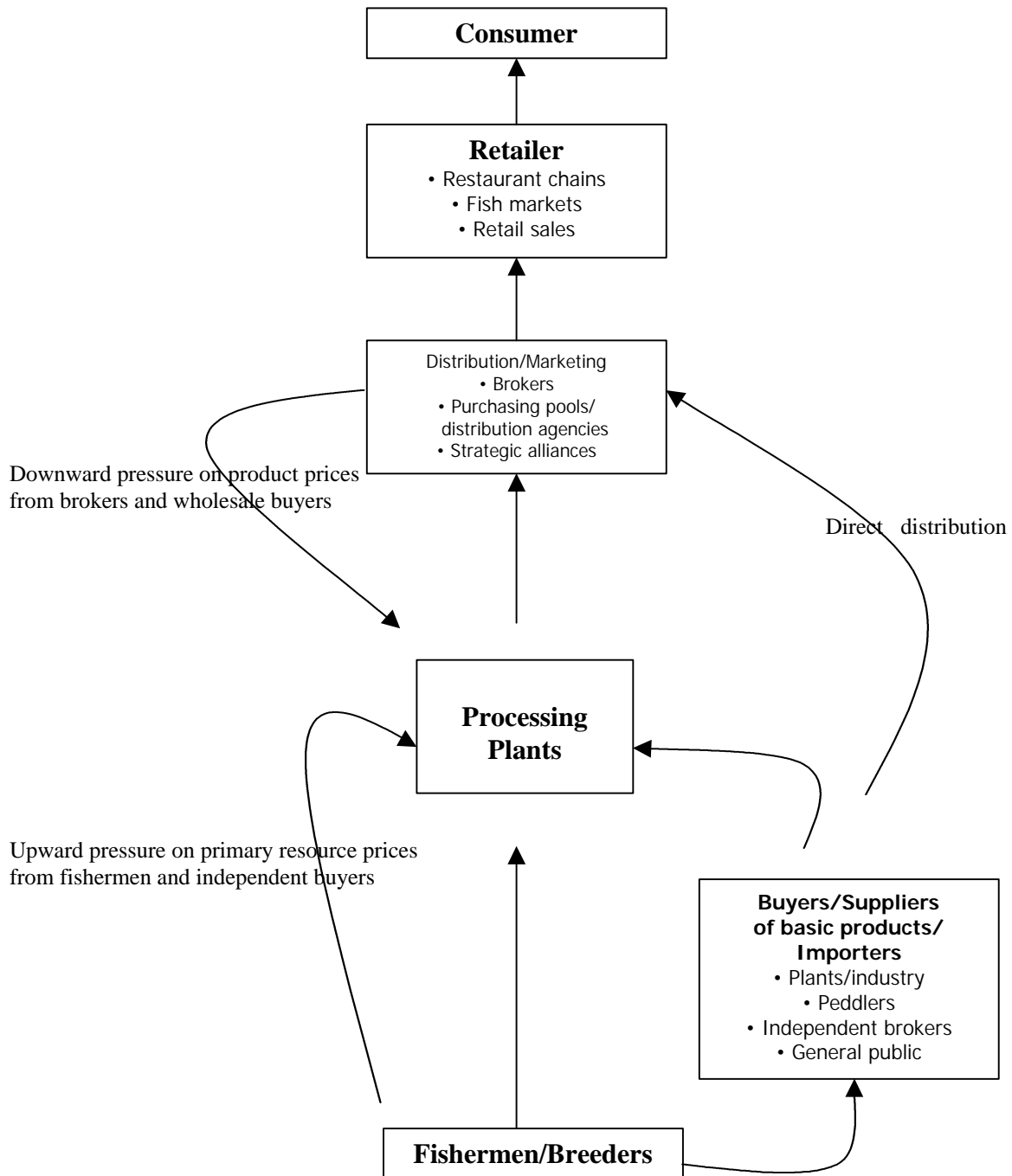
### PROCESSING COMPANIES BY SIZE CATEGORY

	Processing Firms by Number of Employees Category					
	< 9	10 - 25	26 - 99	100 - 499	500+	Total
Number of Firms	313	204	174	146	21	858
Employees	1,100	3,193	8,622	27,165	28,508	68,588
Sales	\$1,097,615	\$1,170,773	\$1,561,671	\$2,463,210	\$3,238,009	\$9,531,278
Average # Employees	3.5	15.7	49.6	186.1	1,357.5	79.9
Average Sales / Firm	\$3,507	\$5,739	\$8,975	\$16,871	\$154,191	\$11,109
Average Sales / Employee	\$997,832	\$366,669	\$181,126	\$90,676	\$113,582	\$138,964

### PROCESSING COMPANIES BY LOCATION (PROVINCE)

	Number of Firms	Employees	Sales	Average # Employees	Average Sales / Firm	Average Sales / Employee
NS	320	14,565	\$2,647,671	45.5	\$8,274	\$181,783
NB	145	14,592	\$993,949	100.6	\$6,855	\$68,116
PI	60	4,873	\$413,057	81.2	\$6,884	\$84,764
QC	41	2,162	\$572,001	52.7	\$13,951	\$264,570
NF	111	20,844	\$2,163,765	187.8	\$19,493	\$103,808
ON	55	4,264	\$1,093,708	77.5	\$19,886	\$256,498
MB	4	398	\$112,662	99.5	\$28,165	\$283,069
SK	1	42	\$16,894	42.0	\$16,894	\$402,237
AB	3	120	\$44,628	40.0	\$14,876	\$371,902
BC	115	6,725	\$1,472,872	58.5	\$12,808	\$219,014
Other	3	3	\$70	1.0	\$23	\$23,464
Total	858	68,588	\$9,531,278	79.9	\$11,109	\$138,964

## Distribution Channels for Seafood Products





## Distribution Channel Flow Diagram

